



Maine Office of Tourism Visitor Tracking Research 2017 Calendar Year Annual Report *Regional Insights: Maine Beaches*



Prepared by



May 2018

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Research Objectives and Methodology

Research Objectives and Methodology

Three distinct online surveys are used to accomplish the five primary goals of Maine’s visitor tracking research.

Research Objectives	Survey Instruments		
	National Travel Survey	Overnight Visitor	Day Visitor
Identify Maine’s share of the U.S. travel market	✓		
Estimate the number of visitors who come to Maine	✓	✓	✓
Provide a profile of Maine visitors		✓	✓
Estimate the amount of spending generated by tourism in Maine		✓	✓
Determine the Maine traveler’s level of satisfaction and view of Maine		✓	✓

Description of Survey Instruments

National Travel Survey

- Nationally representative sample of the U.S. population
- Surveyed bi-weekly

Overnight Visitor Survey

- Sampled from core advertising markets: New England, NJ, NY, PA, MD, DE, DC, and Canada
- Have taken an overnight trip to Maine in the last four weeks
- Surveyed monthly

Day Visitor Survey

- Sampled from Maine and a 100-mile radius of Maine’s borders
- Have taken a day trip greater than 50 miles from home in the last four weeks
- Surveyed monthly

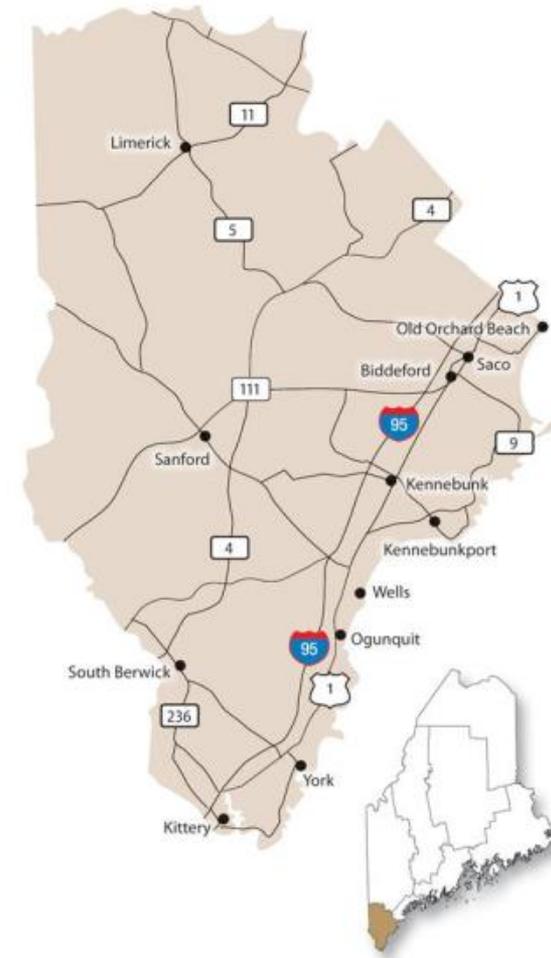
Research Objectives and Methodology

- Survey results were collected during calendar year 2017, for travel to Maine occurring between December 2016 and November 2017. The number of respondents participating in each survey statewide is:

Research Component	2017 Completed Surveys
Overnight Visitor Survey	2,922
Day Visitor Survey	1,782
National Travel Survey	22,070

Research Objectives and Methodology

- The following report provides a profile of visitors and their trips to the **Maine Beaches** tourism region during 2017, including:
 - 682 overnight visitors, and
 - 620 day visitors.
- Throughout this report, data for the **Maine Beaches** tourism region will be presented alongside data for the State of Maine as a whole. Statistically significant differences between the tourism region and the State were calculated at the 95% confidence level and are noted throughout by $< >$. *(A statistically significant difference means the observed difference is more than would be expected by chance 95 out of 100 times.)*
- Statistically significant differences between 2016 and 2017 are also highlighted for both the Maine Beaches region and the State of Maine. A statistically significant **increase** from the previous year is indicated by **green** text, and a significant **decrease** from the previous year is indicated by **red** text.



Overnight Visitors: Traveler Description

Overnight Visitor Demographics

- Overnight visitors to the Maine Beaches tourism region are 43 years old, on average, and have annual household incomes of \$95,000. Two-thirds have at least a college degree, and more than half are married. Sixty-one percent are employed full-time.
- Overnight visitors to the Maine Beaches tend to be slightly older than visitors to Maine overall.

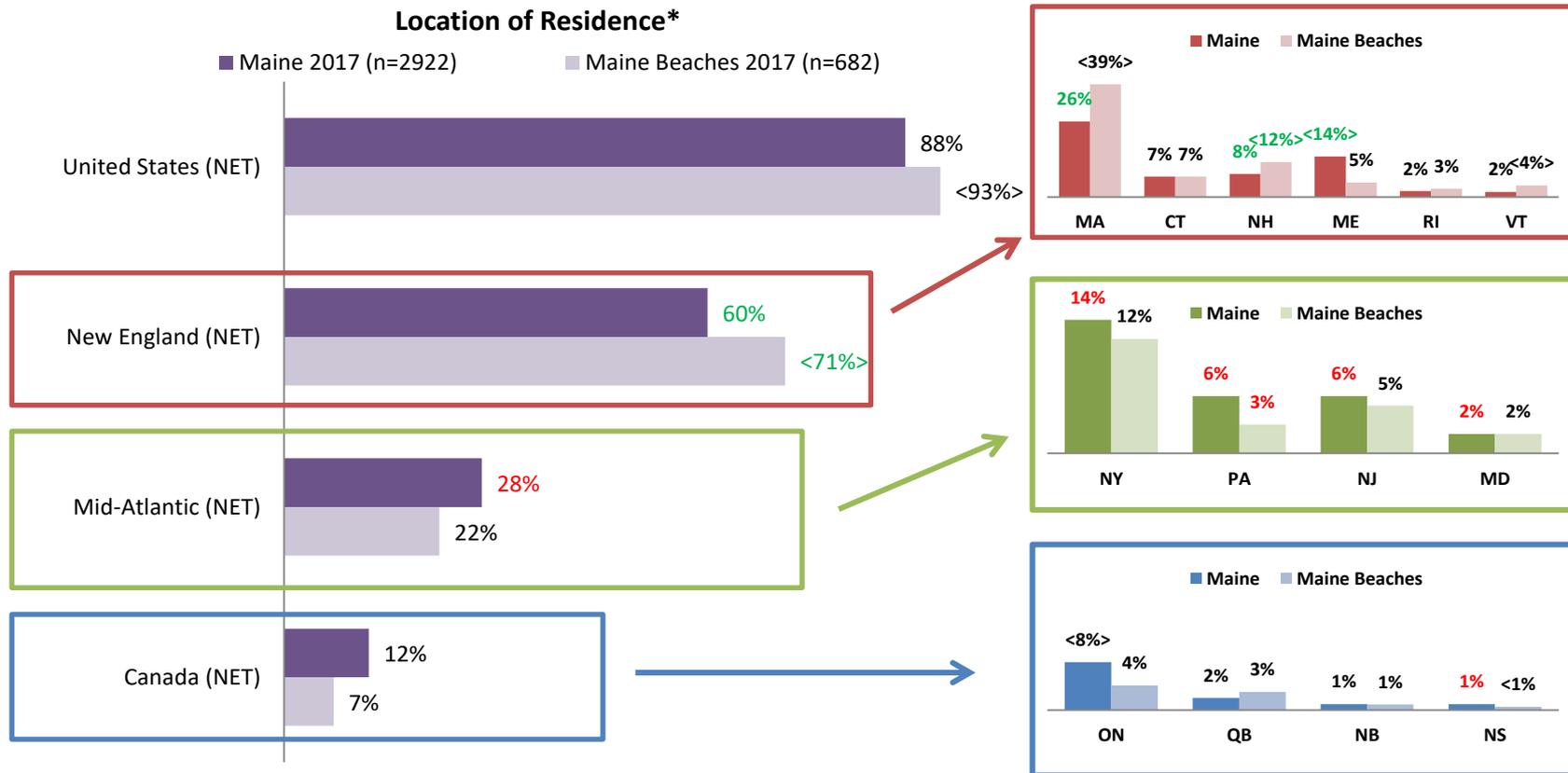
Overnight Visitors	Maine 2017 (n=2922)	Maine Beaches 2017 (n=682)
Age:		
< 35	39%	33%
35 - 44	23%	23%
45 - 54	16%	17%
55 +	22%	<27%>
Mean Age (Years)	40.7	<42.8>
Income:		
< \$50,000	23%	20%
\$50,000 - \$99,999	43%	44%
\$100,000 +	34%	36%
Mean Income	\$92,700	\$95,100
Female	70%	73%
College Degree or Higher	65%	64%
Married	50%	53%
Employed Full-Time	62%	61%

<> indicates a significant difference between this region and the State at the 95% confidence level.

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Massachusetts supplies two in five overnight visitors to the Maine Beaches, the highest proportion of any state or province.

- Compared to the State of Maine as a whole, this region attracts a higher proportion of overnight visitors from New England (specifically Massachusetts and New Hampshire).
- In-state overnight visitors are less prevalent in the Maine Beaches region than in the rest of the State.



*Regions/states/provinces of residence reported here reflect the geographic target area included in the Visitor Profile surveying. Though people from other areas of the country do visit Maine, this study only includes those residing in Maine's core advertising markets.

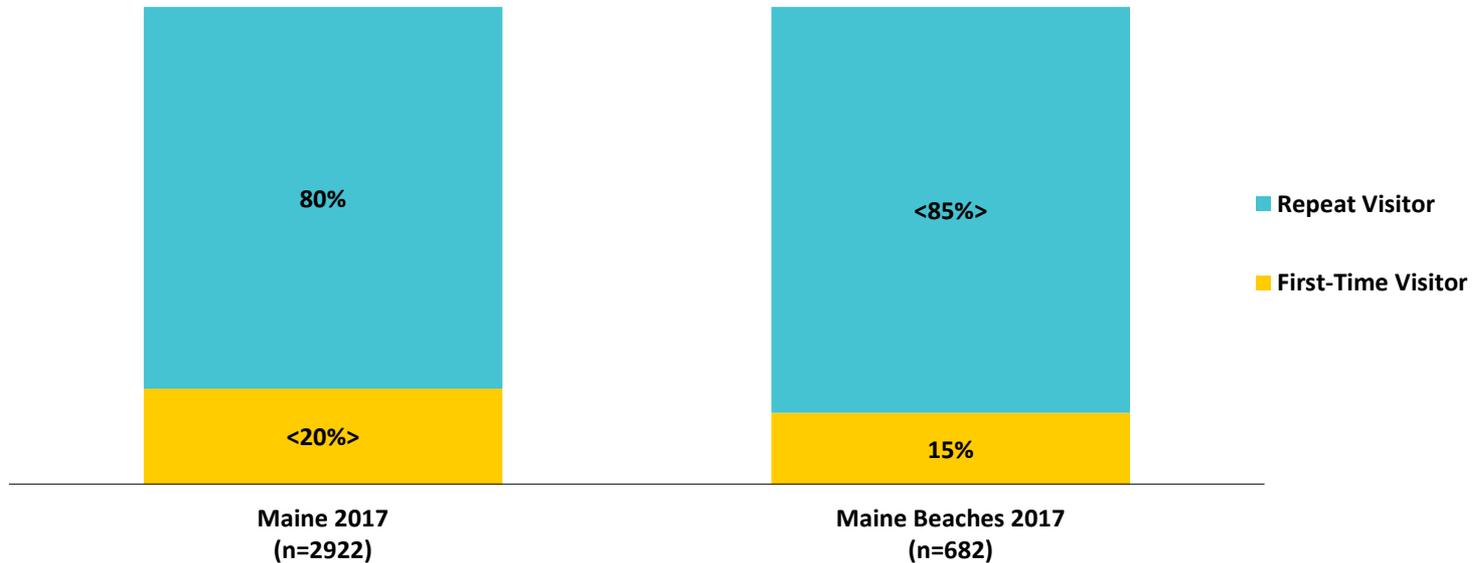
<> indicates a significant difference between this region and the State at the 95% confidence level.

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

The majority of overnight visitors to the Maine Beaches are repeat visitors.

- The Maine Beaches region attracts a higher proportion of repeat visitors than does the State of Maine overall.

Repeat vs. First-Time Visitors

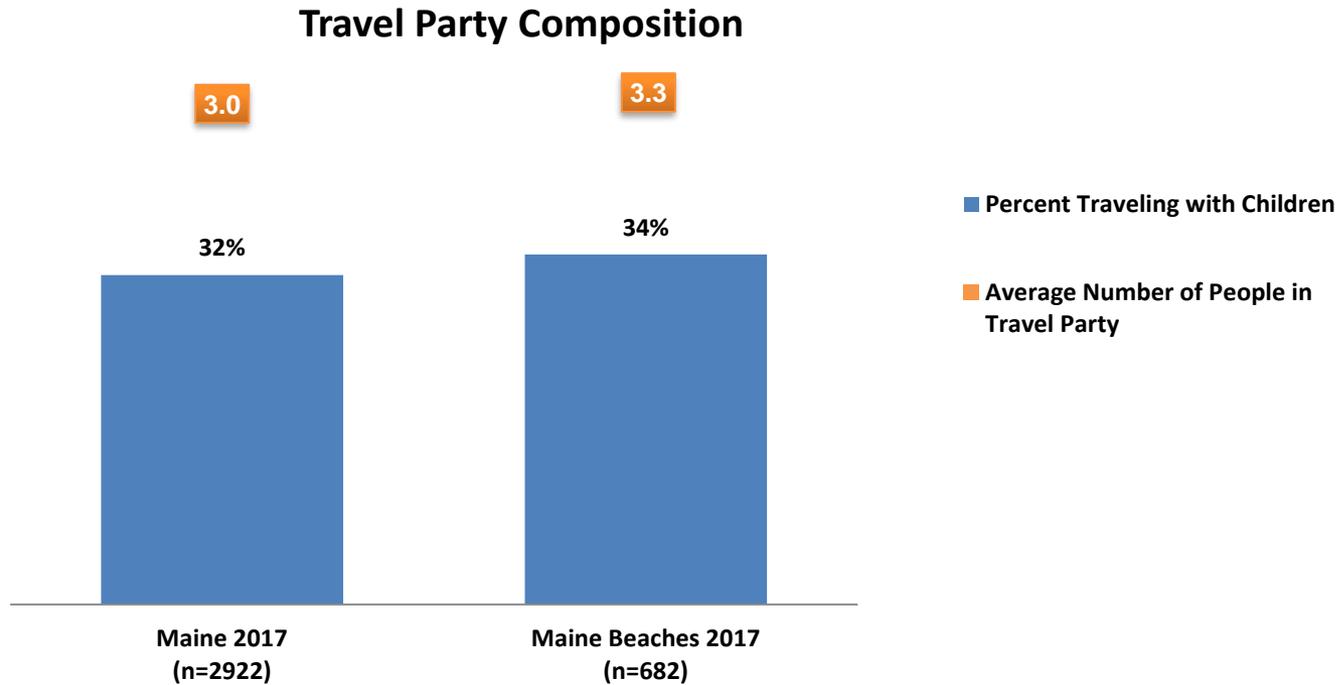


Q11. Was this your first visit in Maine?

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Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

On average, overnight visitors to the Maine Beaches travel in parties of three, and one-third have children with them.



Q24. Including yourself and any children, how many people were in your immediate travel party on this specific trip to Maine?

Q25. How many of these people were: Children?

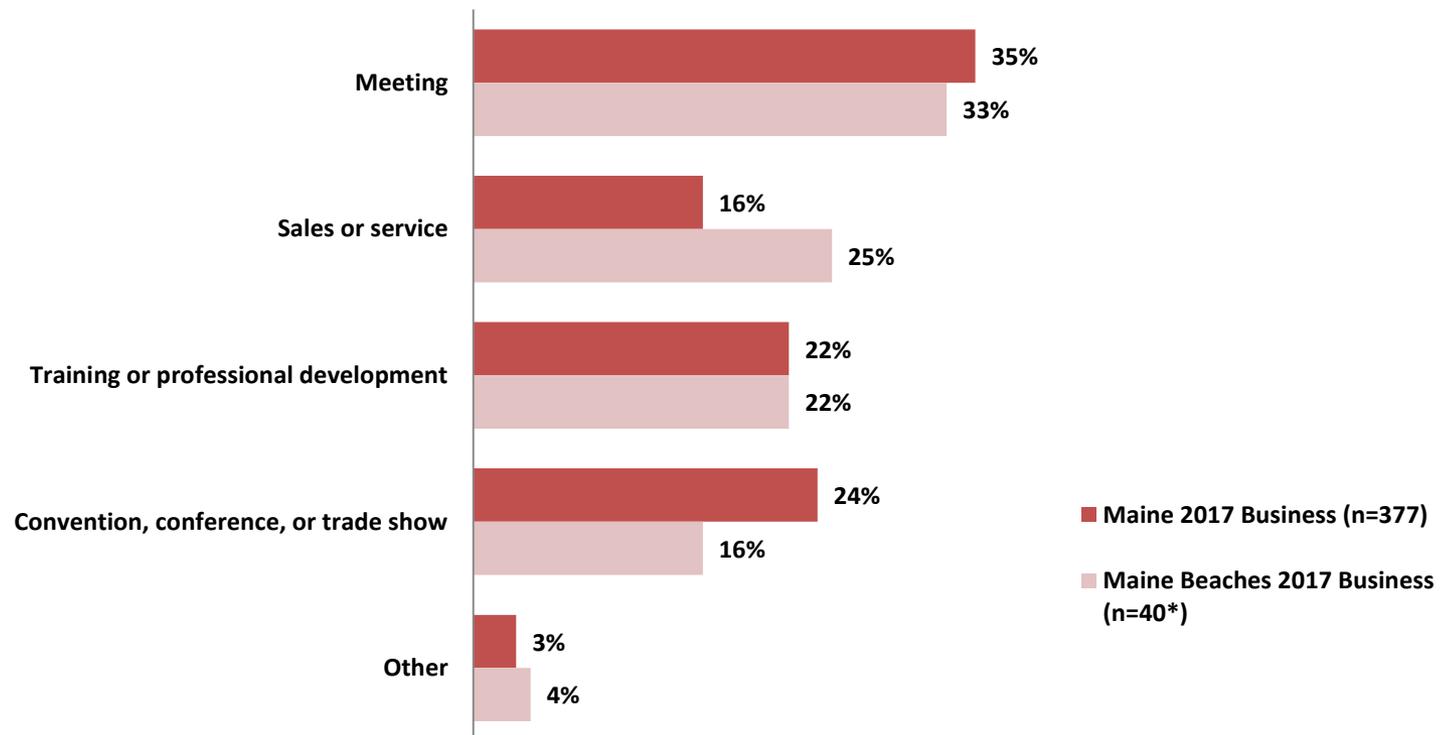
<> indicates a significant difference between this region and the State at the 95% confidence level.

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Overnight Visitors: Trip Experience

One-third of overnight business travelers visit the Maine Beaches region for a *meeting*.

Primary Purpose of Overnight Business Trips



Q8. What was the primary purpose of your most recent business trip in Maine?

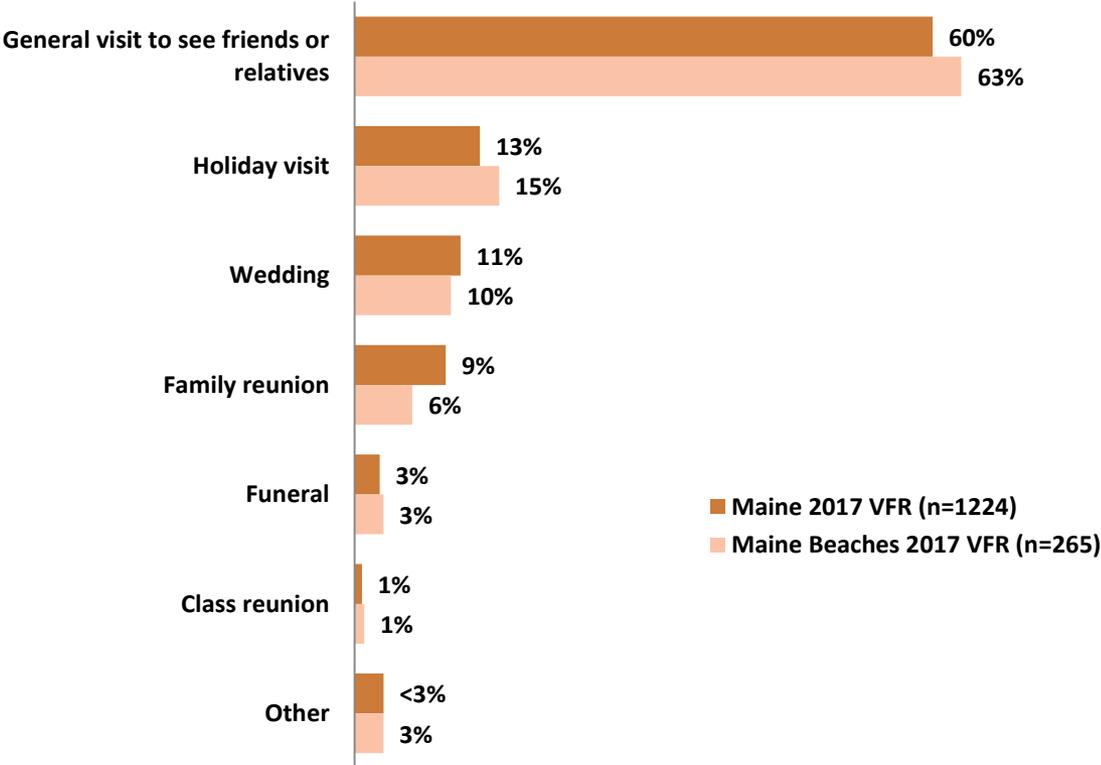
<> indicates a significant difference between this region and the State at the 95% confidence level.

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

*Please note small sample size. Use caution when interpreting results.

Among overnight VFR travelers, two in three are visiting for a general visit to see friends/relatives.

Primary Purpose of Overnight VFR* Trips



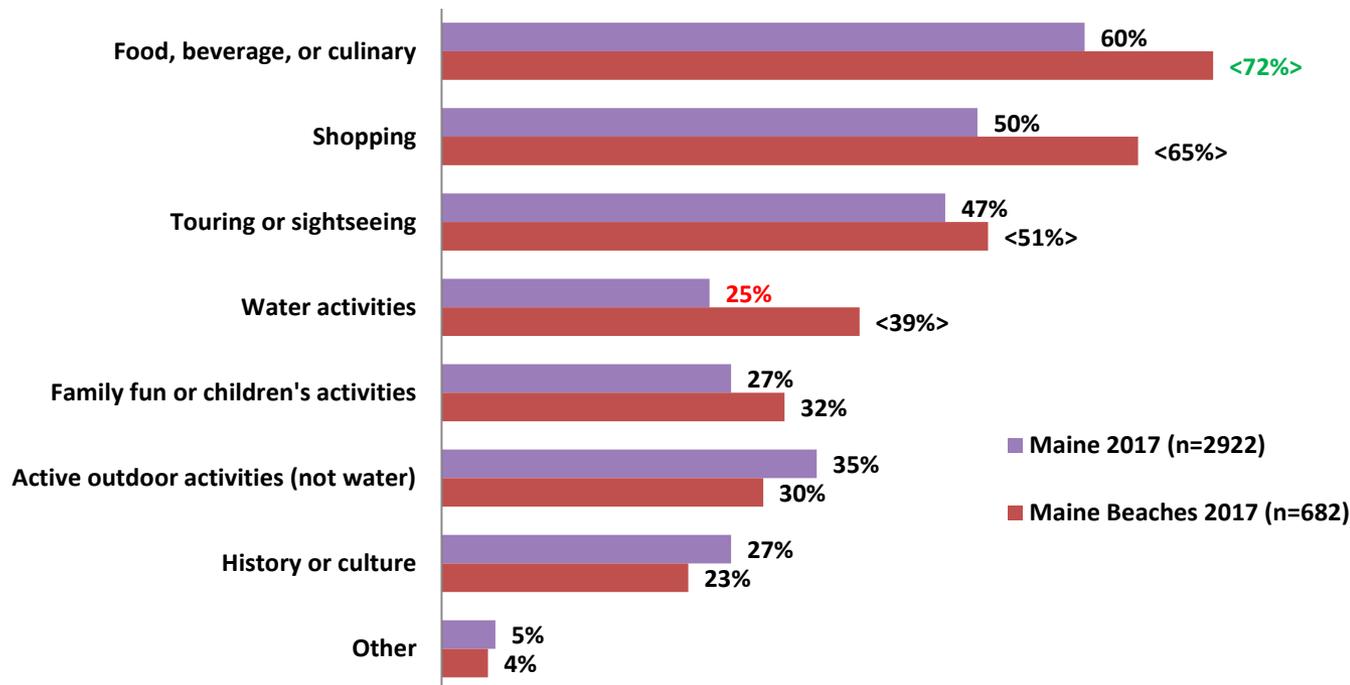
Q9. What was the primary purpose of your most recent visit to friends or relatives in Maine?
<> indicates a significant difference between this region and the State at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.
*VFR = Visiting Friends and Relatives



Food/beverage/culinary activities and shopping are the top interest areas among overnight visitors to the Maine Beaches region.

- Maine Beaches visitors are more likely than overnight visitors to the State of Maine overall to be interested in pursuing the following activities on their trip to Maine: *food/beverage/culinary activities, shopping, touring/sightseeing, and water activities.*

2017 Interest Areas



Most Important Interest Area
The Maine Beaches

Food, beverage, or culinary	35%
Shopping	12%
Touring or sightseeing	45%
Water activities	31%
Family fun or children's activities	60%
Active outdoor activities (not water)	21%
History or culture	12%
Other	73%

Q35. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply.*

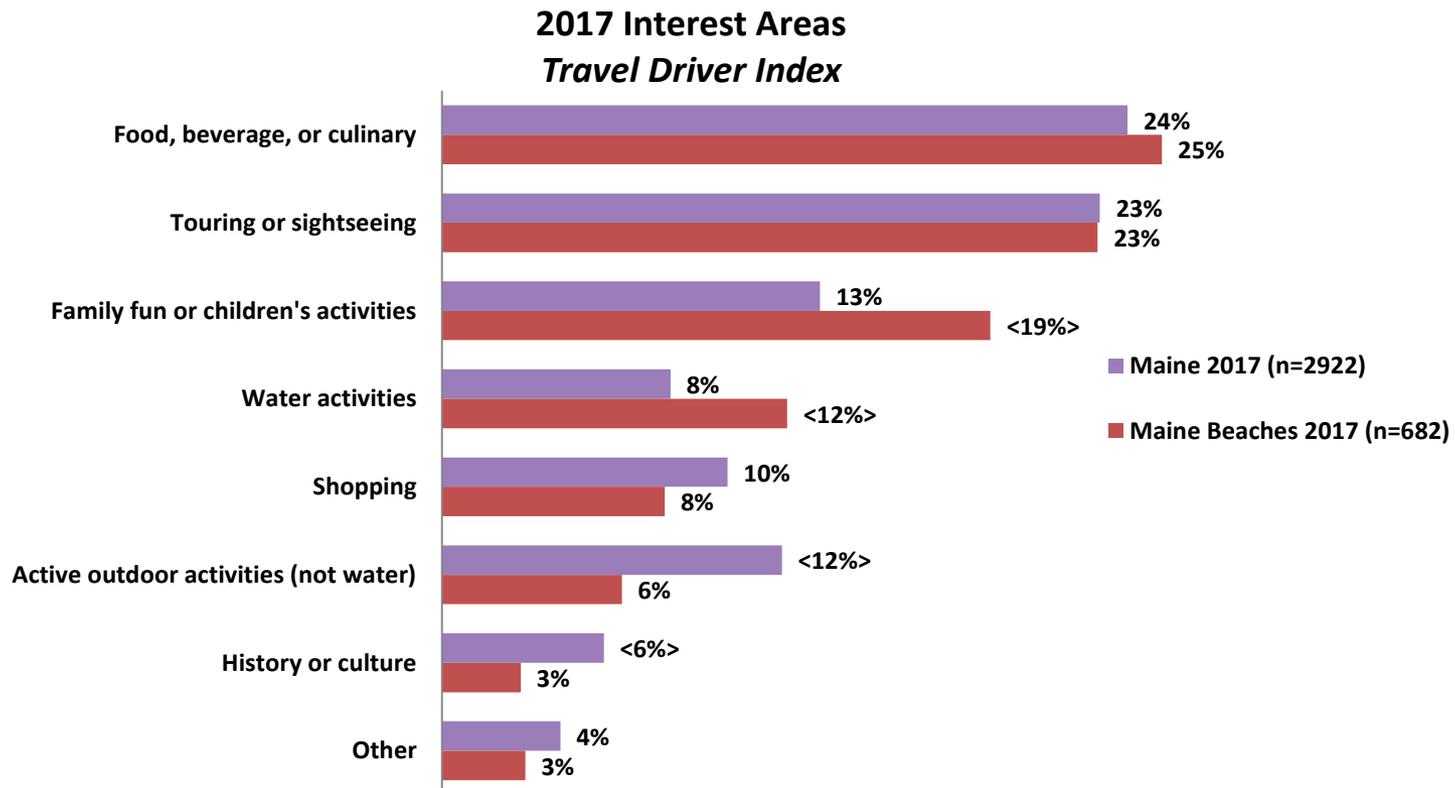
Q36. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important. 15

<> indicates a significant difference between this region and the State at the 95% confidence level.

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

When considering both interest and importance together, *food/beverage/culinary* activities and *touring/sightseeing* rank highest among overnight visitors to the Maine Beaches region.

- Water activities and family fun/children’s activities both rank higher in terms of interest and importance for the Maine Beaches region, as compared to the State as a whole. History/culture and active outdoor activities, on the other hand, rank lower among overnight visitors to this region as compared to the rest of the State.



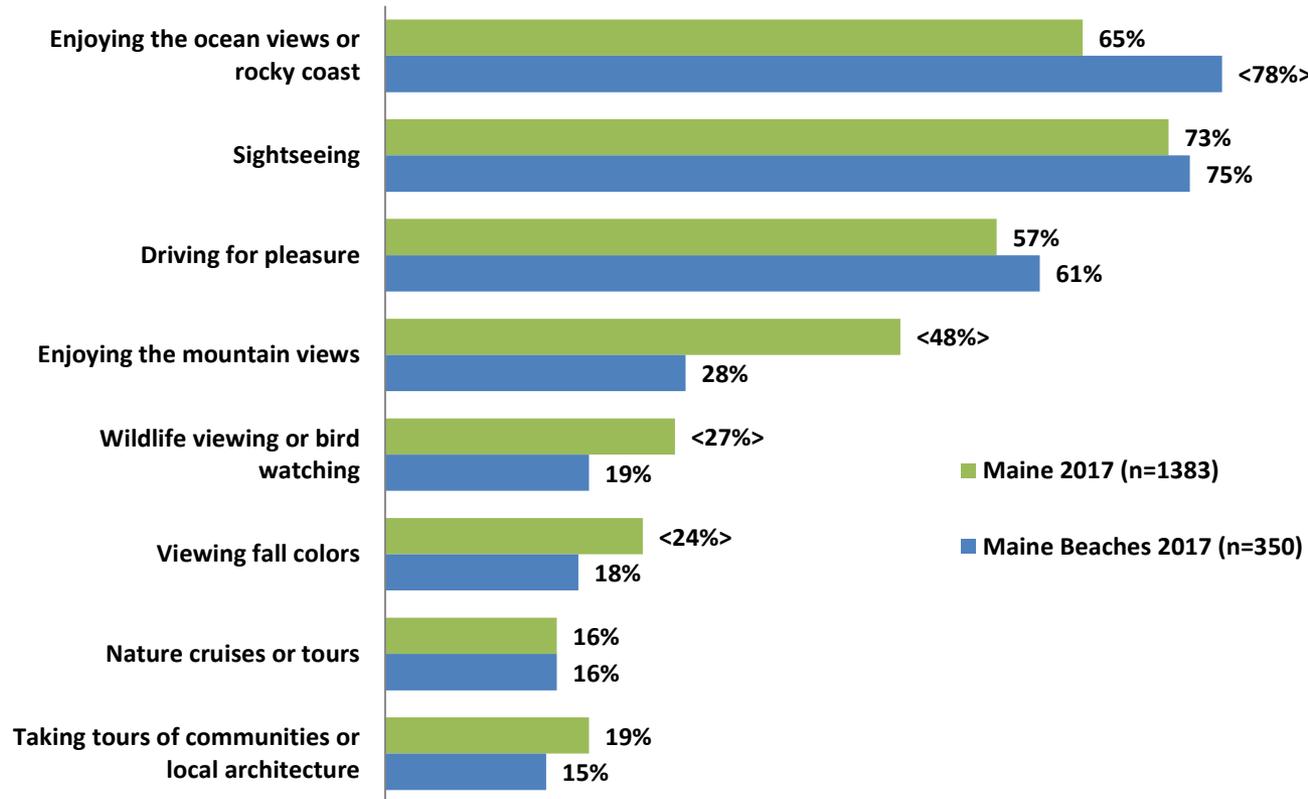
Travel Driver Index = percentage selecting category as interest area X percentage ranking same interest area as most important

The most common activities among overnight visitors to the region who are interested in touring/sightseeing are *enjoying the ocean views/rocky coast and sightseeing*.

- Overnight visitors to the Maine Beaches region who are interested in touring or sightseeing are more likely to *enjoy the ocean views/rocky coast* while visiting compared to visitors to the state overall. They are less likely to *enjoy the mountain views, view wildlife or birds, and view fall colors*.

Touring or Sightseeing Activities

Base: Those who report touring or sightseeing as an interest area for their Maine trip



Q37. In which of the following activities did you participate during this trip? *Please check all that apply.*

<> indicates a significant difference between this region and the State at the 95% confidence level.

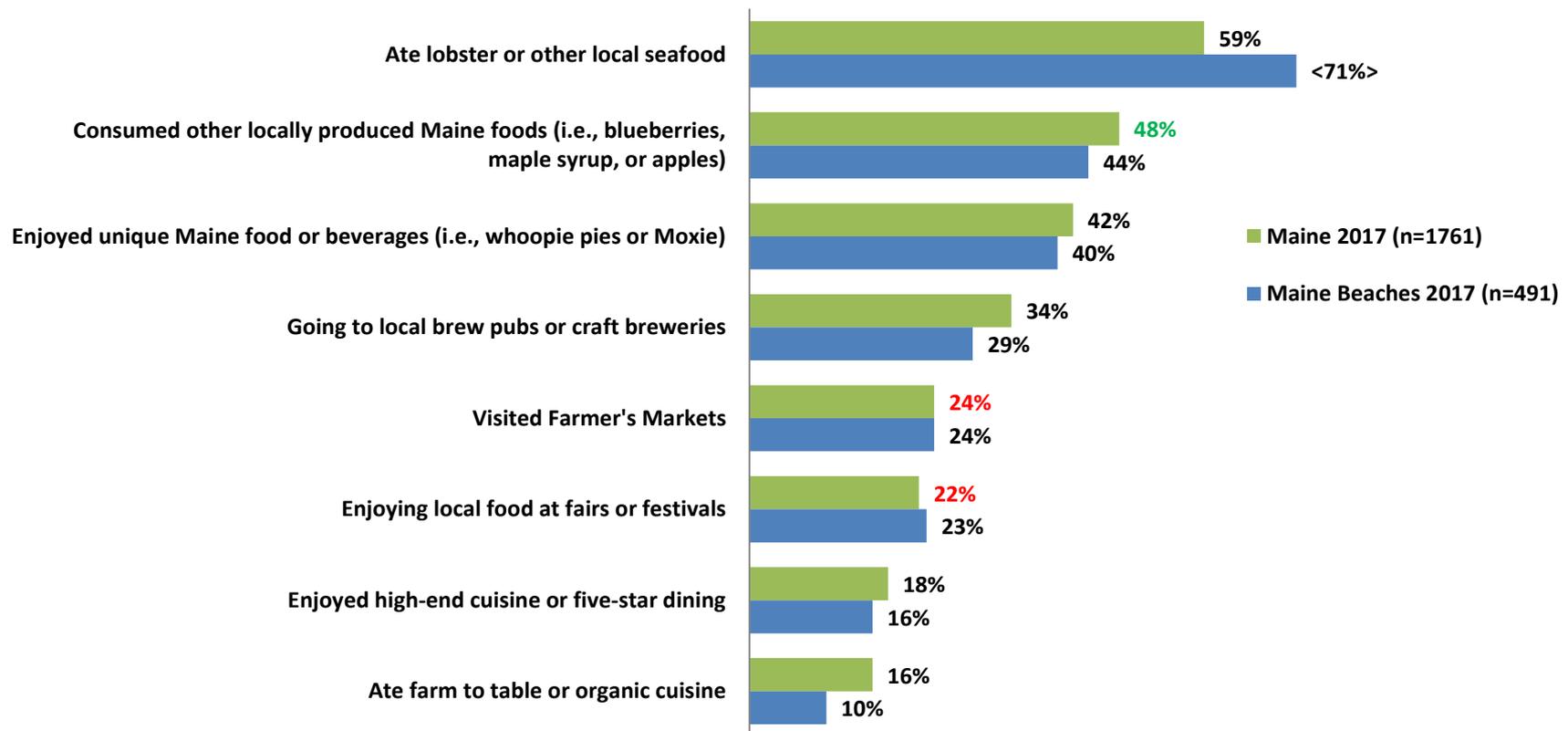
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Seven in ten overnight visitors who are interested in food/beverage/culinary activities ate lobster or other local seafood while visiting the Maine Beaches region.

- Eating lobster or other local seafood is more common among visitors to the Maine Beaches region than among all overnight visitors to the State of Maine.

Food, Beverage, or Culinary Activities

Base: Those who report food, beverage, or culinary as an interest area for their Maine trip



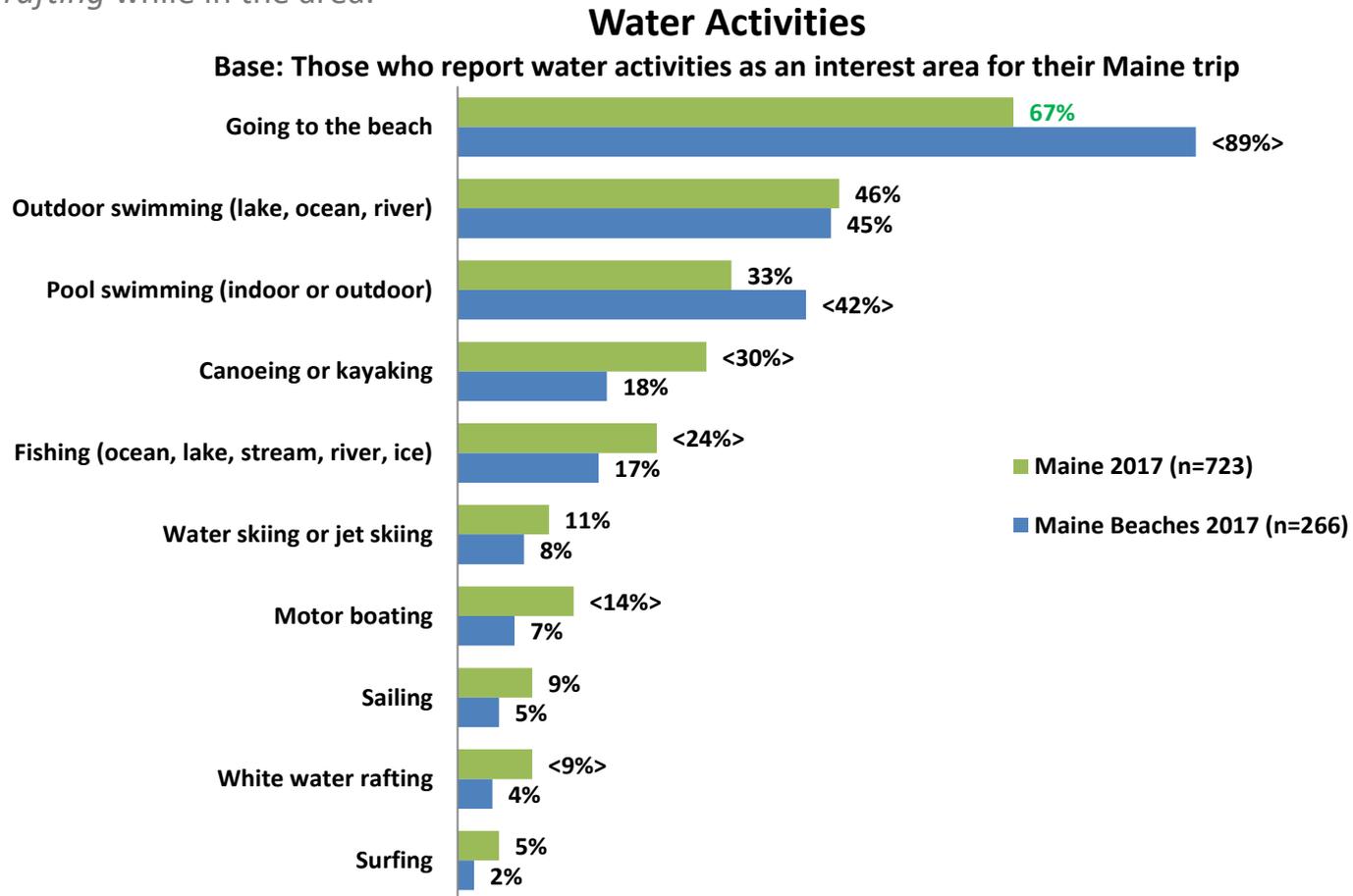
Q37. In which of the following activities did you participate during this trip? Please check all that apply.

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Among overnight visitors interested in water activities, *going to the beach* is the most common activity in the Maine Beaches region.

- As may be expected, overnight visitors to the Maine Beaches region are more likely to *go to the beach* compared to visitors to the State as a whole. Maine Beaches visitors are also more likely to enjoy *pool swimming* while visiting. However, they are less likely to *canoe or kayak, go motor boating, fish, or go white water rafting* while in the area.



Q37. In which of the following activities did you participate during this trip? *Please check all that apply.*

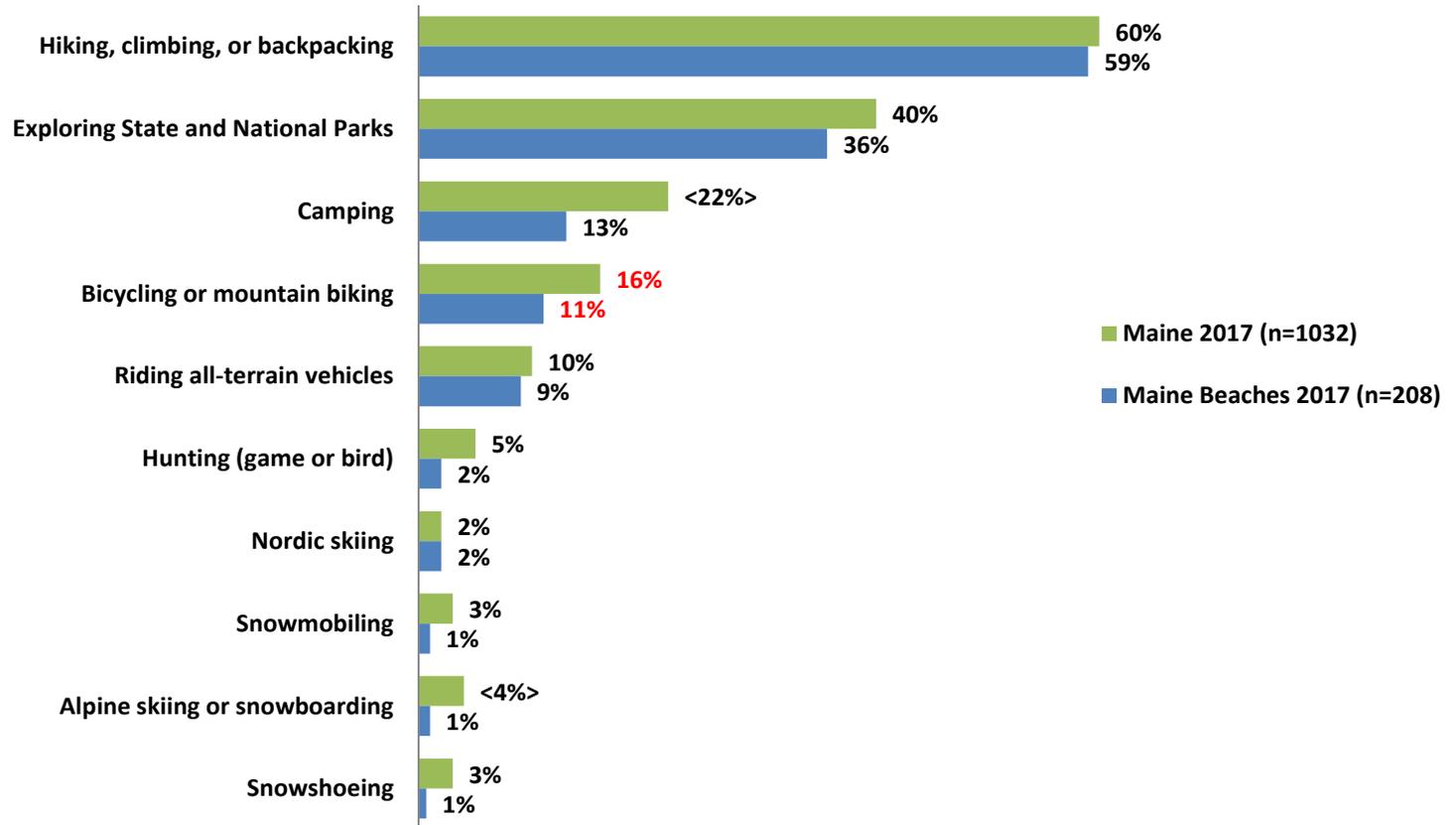
<> indicates a significant difference between this region and the State at the 95% confidence level.

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Three in five visitors to the Maine Beaches region who are interested in active outdoor activities go *hiking/climbing/backpacking* while visiting.

Active Outdoor Activities – Non-Water

Base: Those who report outdoor activities as an interest area for their Maine trip



Q37. In which of the following activities did you participate during this trip? *Please check all that apply.*

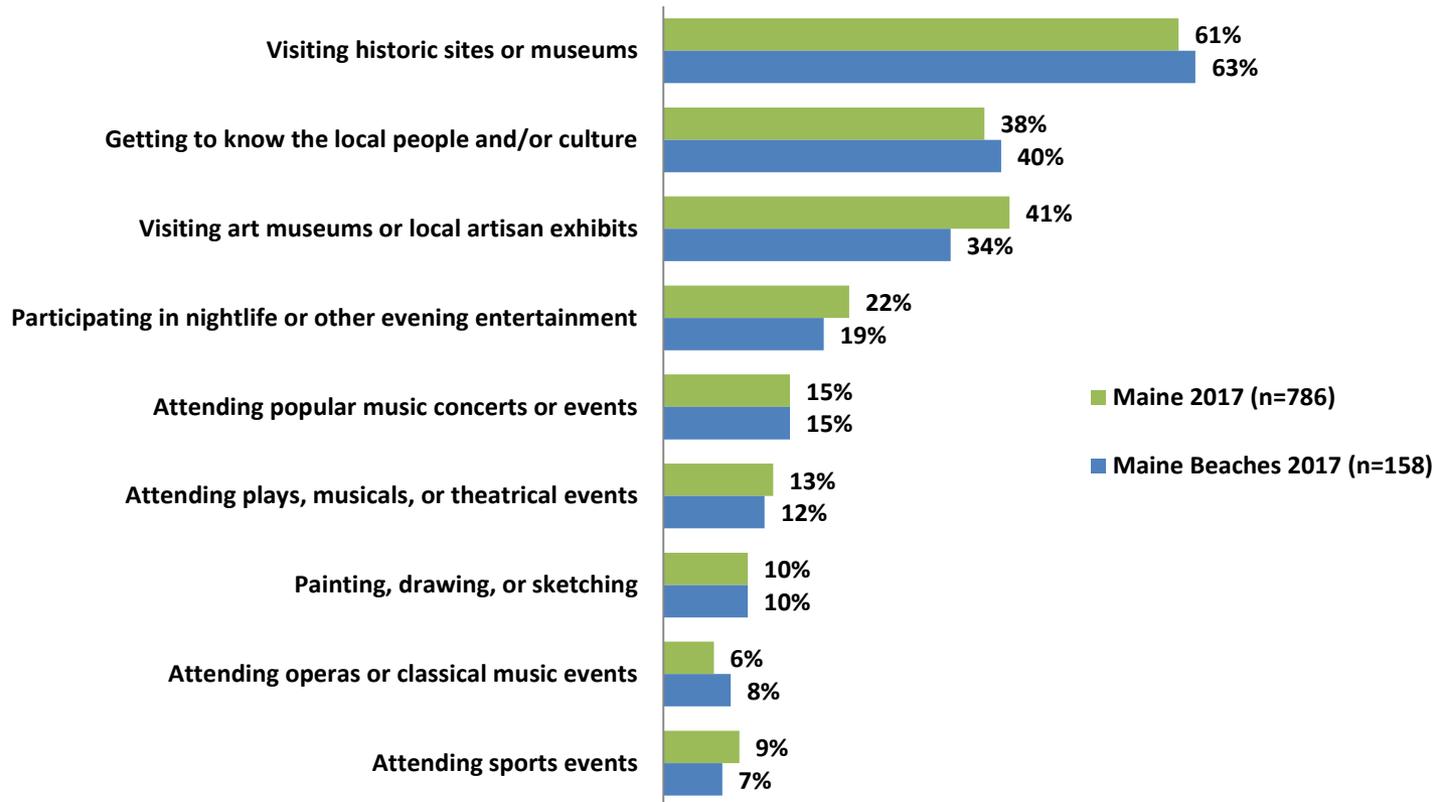
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Visiting historic sites/museums is the most common activity among overnight visitors to the Maine Beaches who are interested in history/culture activities.

History or Culture Activities

Base: Those who report history or culture as an interest area for their Maine trip



Q37. In which of the following activities did you participate during this trip? *Please check all that apply.*

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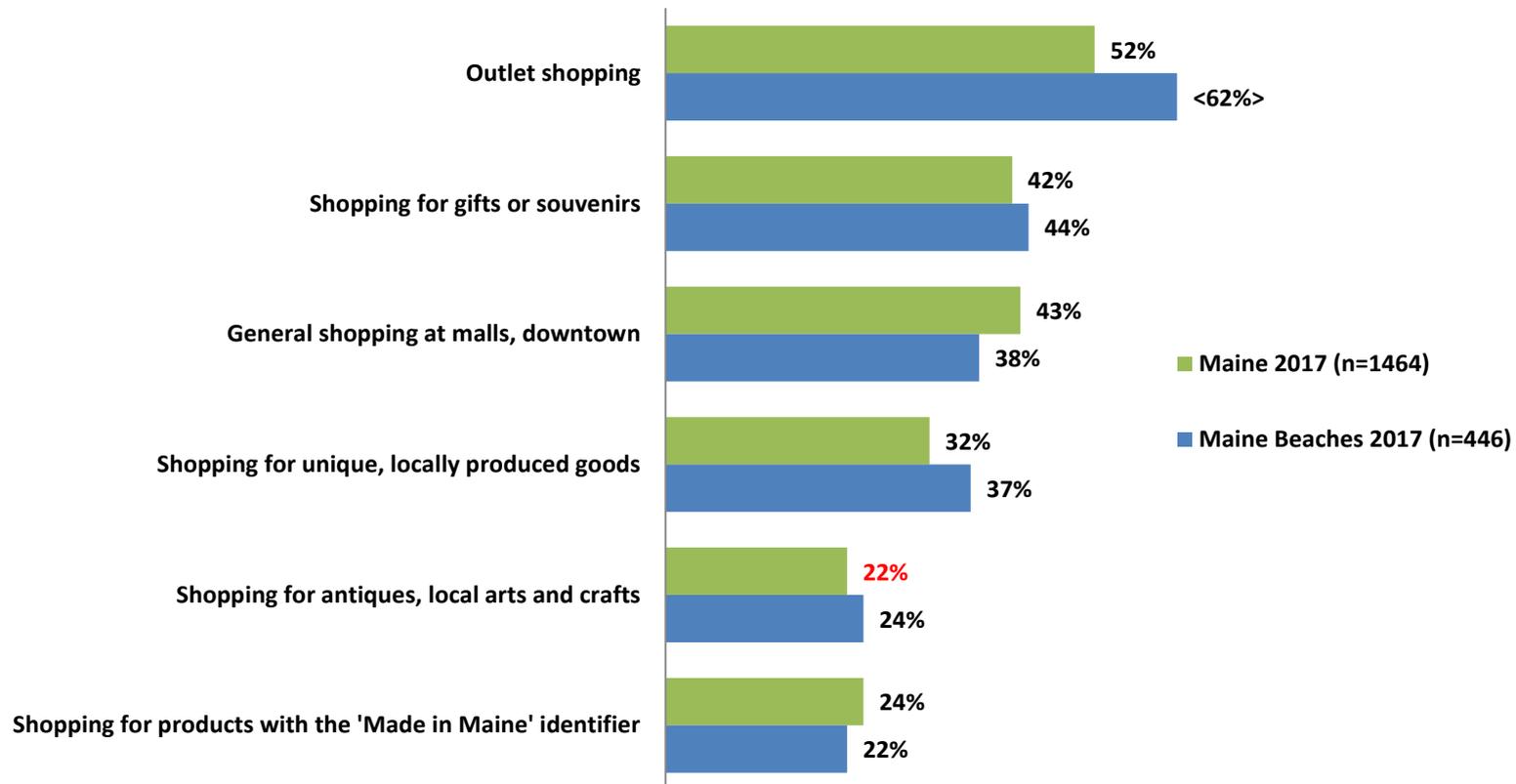
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Outlet shopping is the most popular shopping activity among overnight visitors to the Maine Beaches region.

- Compared to overnight visitors to the State of Maine overall, Maine Beaches visitors are more likely to *shop at the outlets* while visiting.

Shopping Activities

Base: Those who report shopping as an interest area for their Maine trip



Q37. In which of the following activities did you participate during this trip? *Please check all that apply.*

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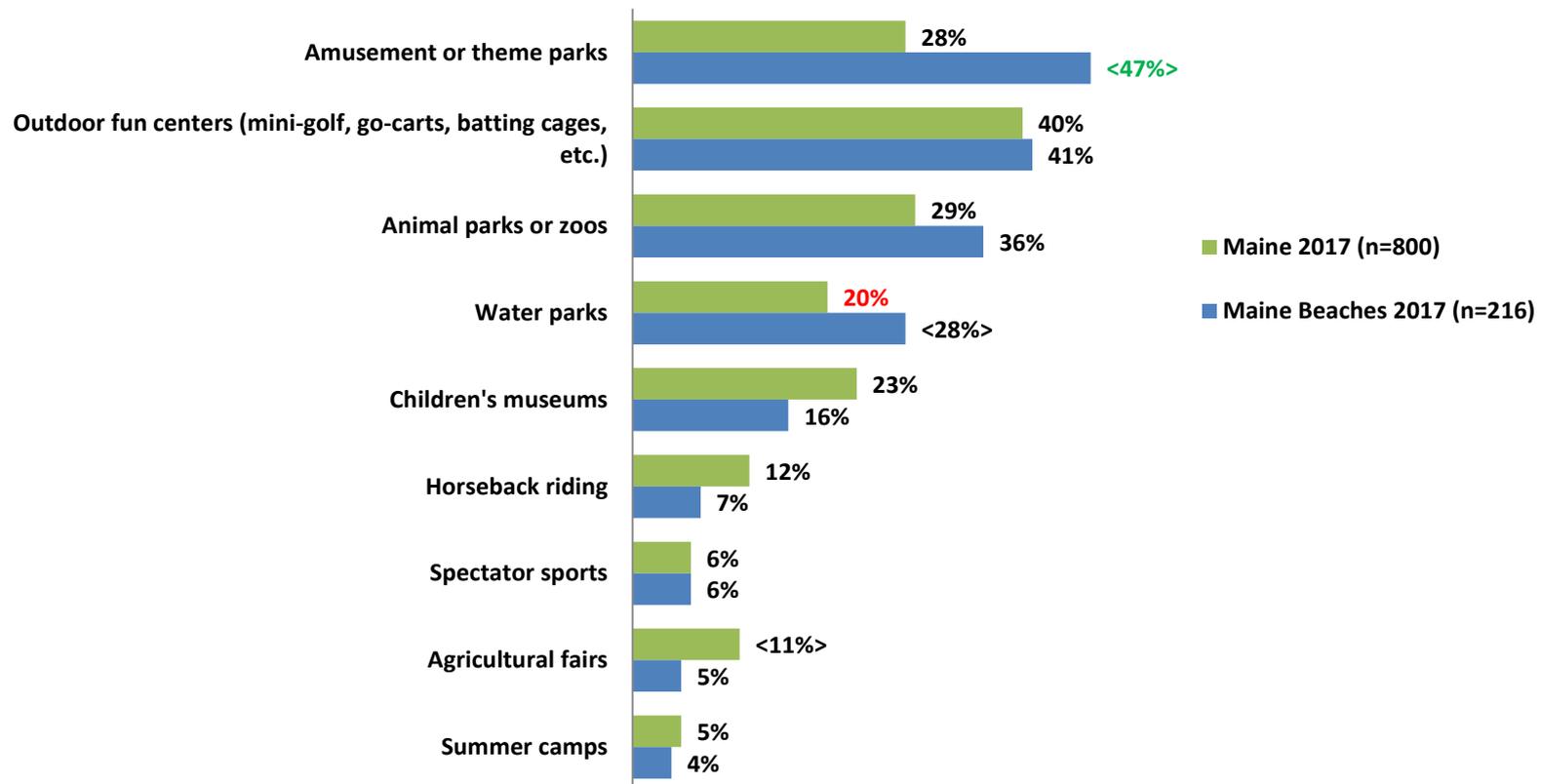
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Nearly half of overnight visitors to the region who are interested in family fun/children’s activities spend time at *amusement/theme parks*.

- Compared to overnight visitors to the State of Maine overall, Maine Beaches visitors are more likely to visit *amusement/theme parks* and *water parks* while in the region, and less likely to attend *agricultural fairs*.

Family Fun/Children’s Activities

Base: Those who report family fun/children’s activities as an interest area for their Maine trip



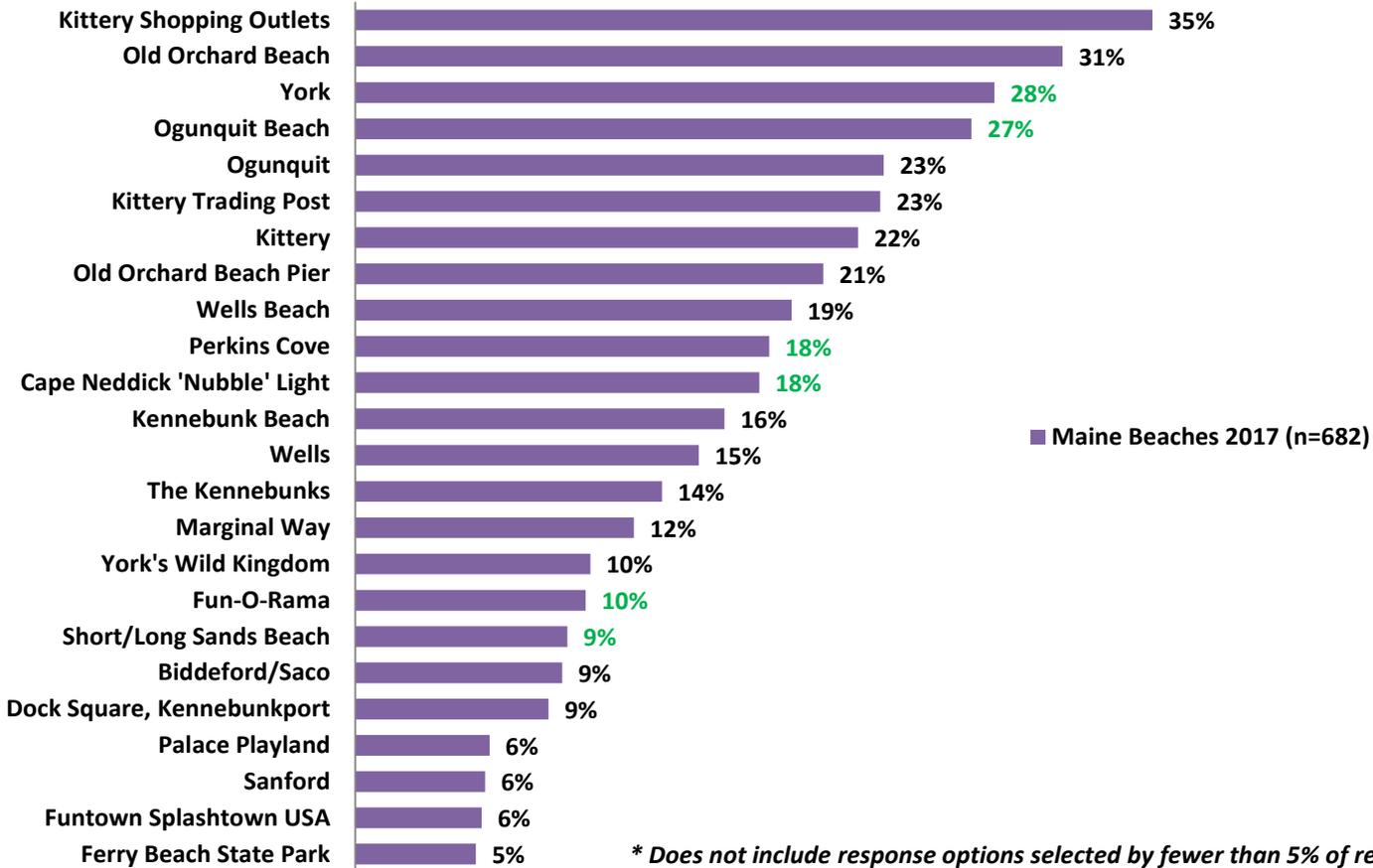
Q37. In which of the following activities did you participate during this trip? Please check all that apply.

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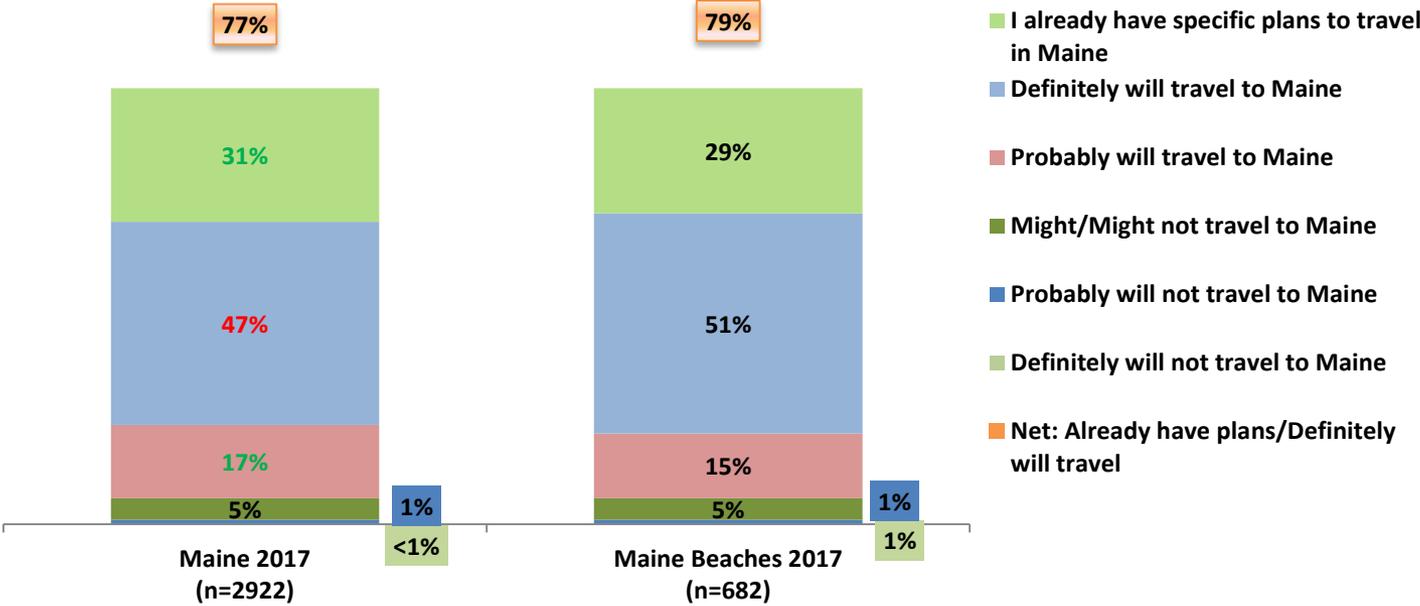
One-third of overnight visitors to the Maine Beaches region spend time at the *Kittery Shopping Outlets* or *Old Orchard Beach*.

Top Attractions/Locations Visited*



Eight in ten overnight visitors to the Maine Beaches region plan to return to Maine in the next two years.

Future Travel Likelihood



Q44. How likely will you be to travel in Maine in the next two years?
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Day Visitors: Traveler Description

Day Visitor Demographics

- Day visitors to the Maine Beaches region average 46 years old and earn an average of nearly \$89,000 annually. Half are employed full-time.
- Day visitors to the Maine Beaches region are slightly older than Maine day visitors overall and also have higher average annual household incomes.

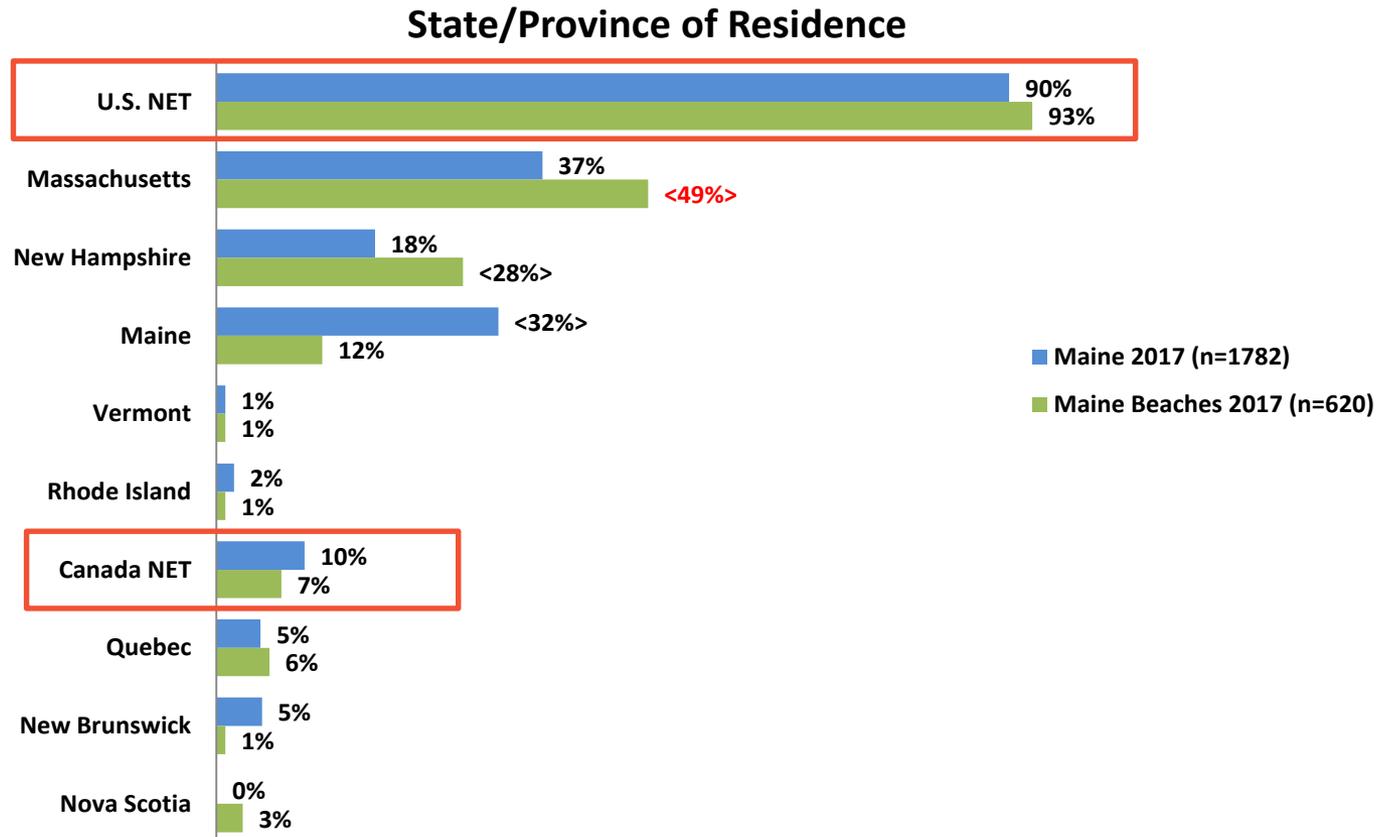
Day Visitors	Maine 2017 (n=1782)	Maine Beaches 2017 (n=620)
Age:		
< 35	33%	29%
35 - 44	19%	18%
45 - 54	19%	20%
55 +	29%	33%
Mean Age (Years)	44.1	<45.6>
Income:		
< \$50,000	32%	23%
\$50,000 - \$99,999	41%	45%
\$100,000 +	27%	32%
Mean Income	\$80,800	<\$88,700>
Female	76%	78%
College Degree or Higher	54%	55%
Married	48%	52%
Employed Full-Time	52%	54%

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Nine in ten day visitors to the region are United States residents, and half are from Massachusetts.

- Compared to the State of Maine as a whole, the Maine Beaches region attracts a greater proportion of day visitors from Massachusetts and New Hampshire, and a lesser proportion from Maine.



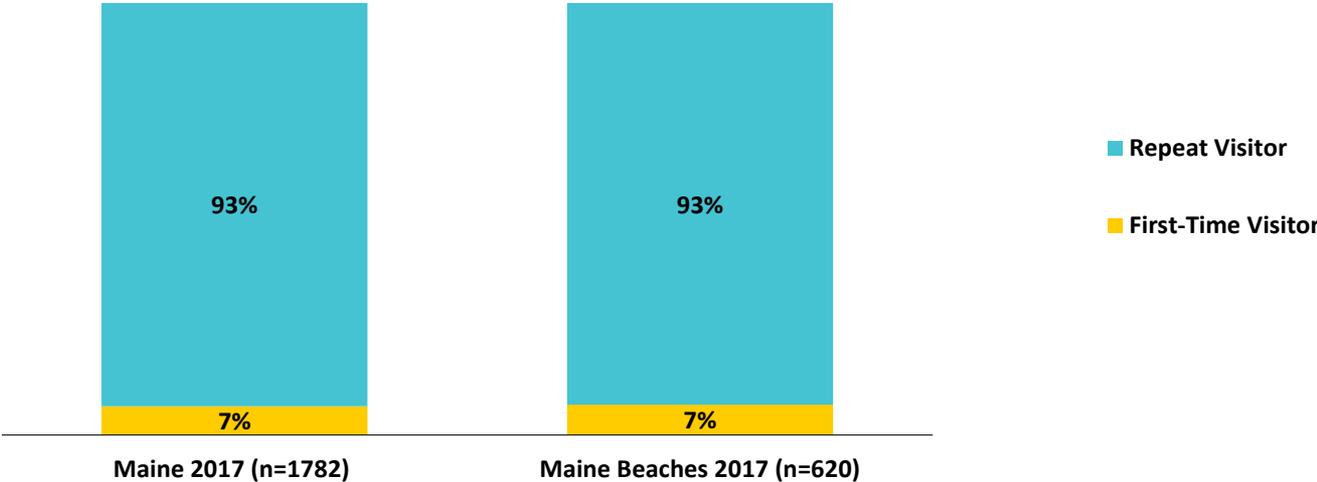
Q2. In what State or Province do you reside?

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Nine in ten day visitors to the Maine Beaches are repeat visitors.

Repeat vs. First-Time Visitors

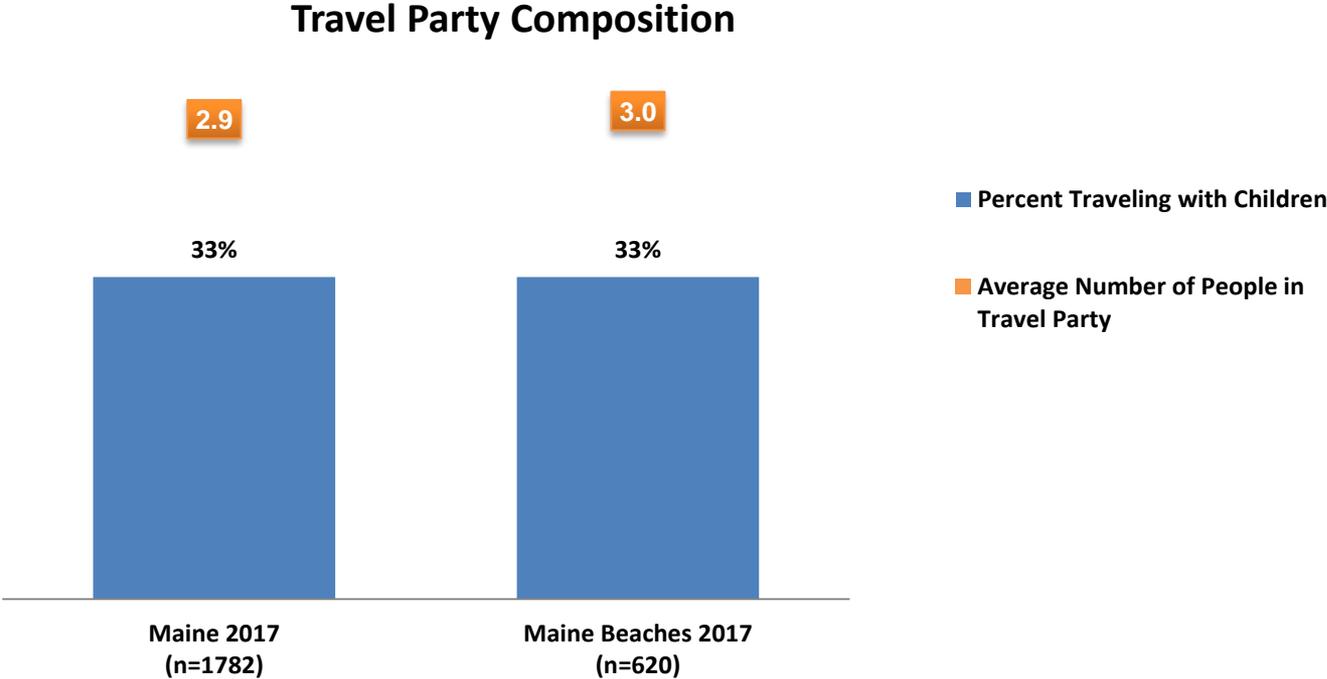


Q10. Was this your first trip to Maine?

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On average, day visitors to the Maine Beaches region are traveling in parties of three, and one-third are traveling with children.



Q15. Including yourself and any children, how many people were in your immediate travel party on this trip?

Q16. How many of these people were: Children

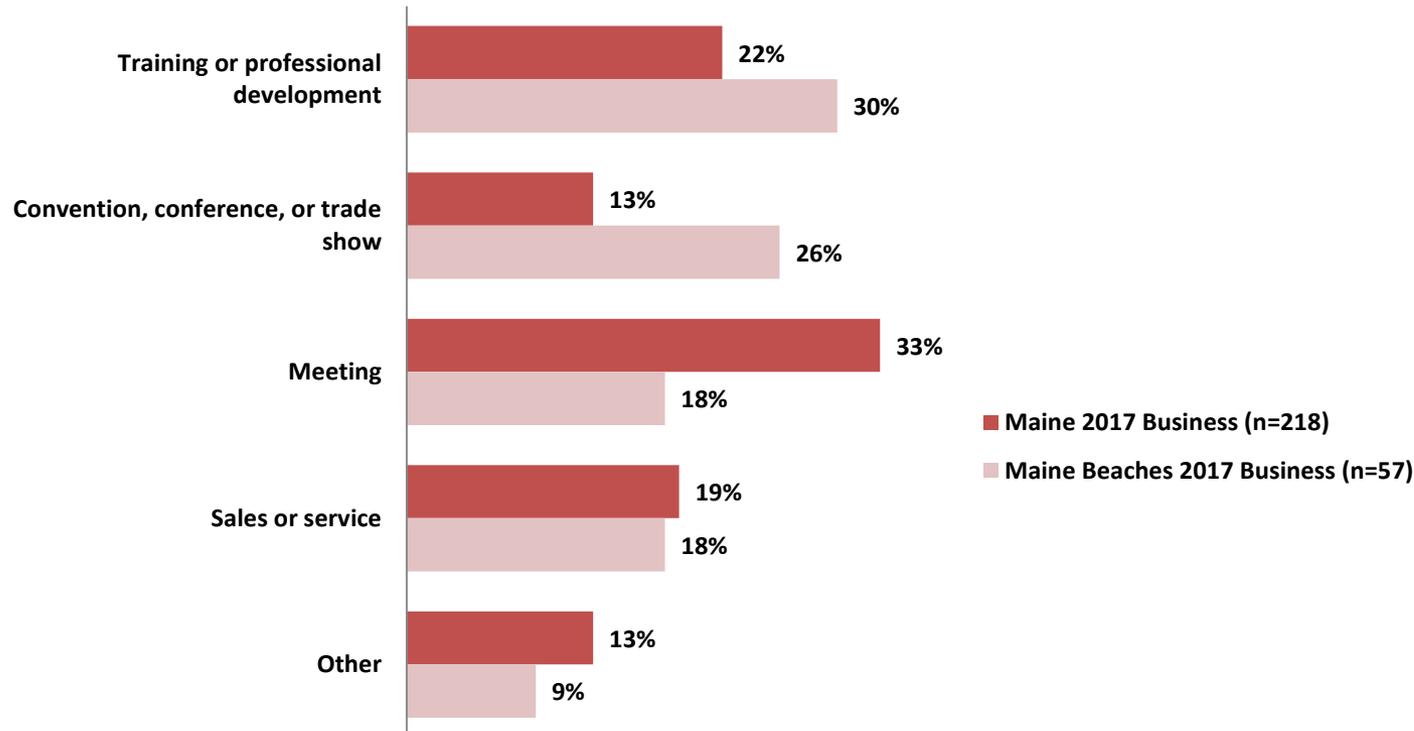
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Day Visitors: Trip Experience

Business day visitors to the Maine Beaches region are most likely to be visiting for training/professional development or a convention/conference/trade show.

Primary Purpose of Day Business Trips



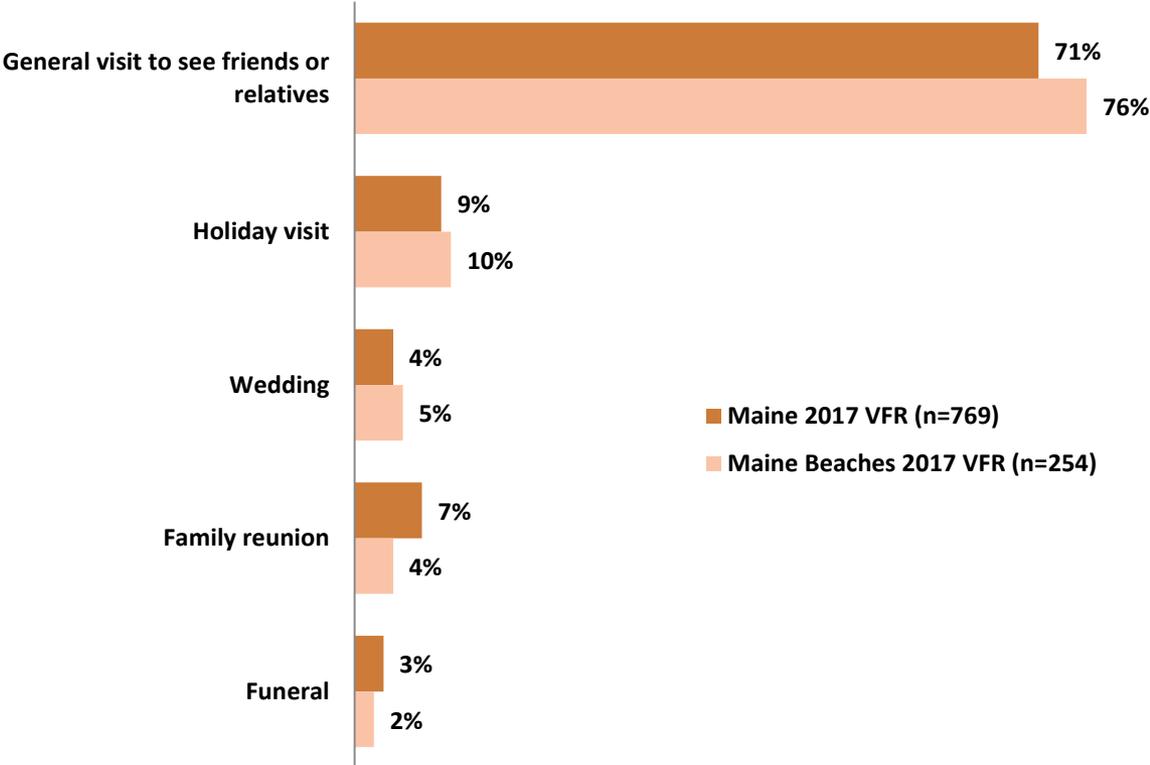
Q8. What was the primary purpose of your most recent business trip in Maine?

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Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Three in four VFR day visitors cite a *general visit to see friends/relatives* as the primary purpose of their trip.

Primary Purpose of Day VFR* Trips

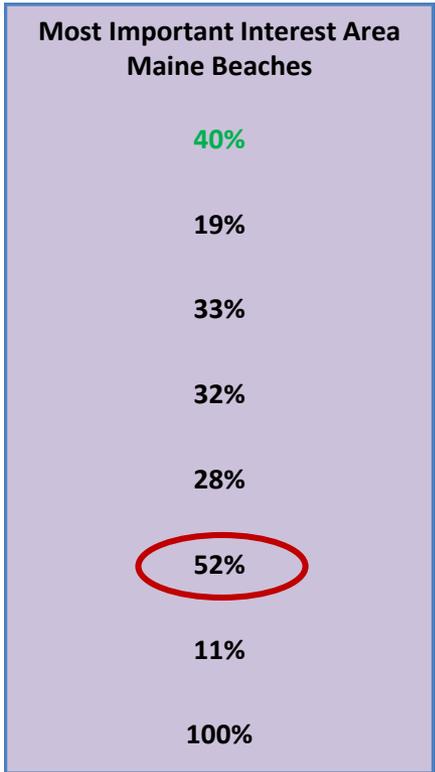
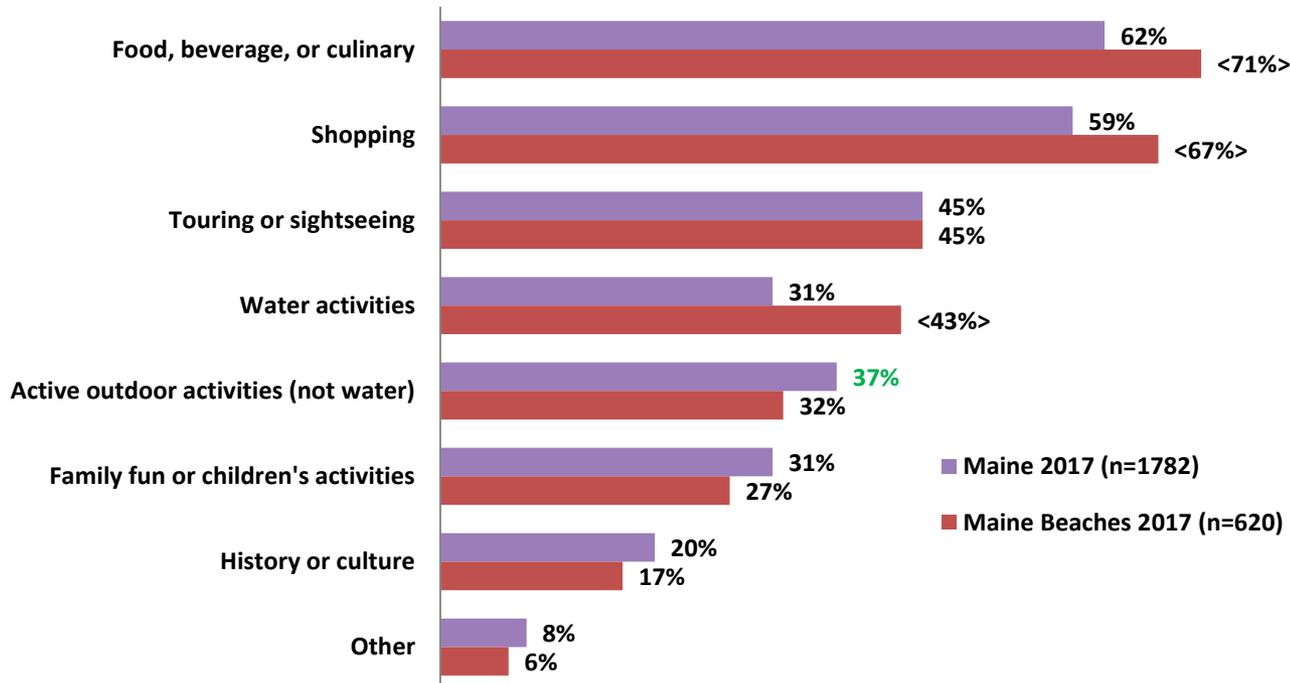


Q9. What was the primary purpose of your most recent visit to friends or relatives in Maine?
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Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.
*VFR = Visiting Friends and Relatives

Day visitors to the Maine Beaches are most likely to pursue *food/beverage/culinary* interests or *shopping* while in the area.

- A higher proportion of day visitors to this region are interested in *food/beverage/culinary activities*, *shopping*, and *water activities* compared to all Maine visitors.

2017 Interest Areas



Q18. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply.*

Q19. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important. 34

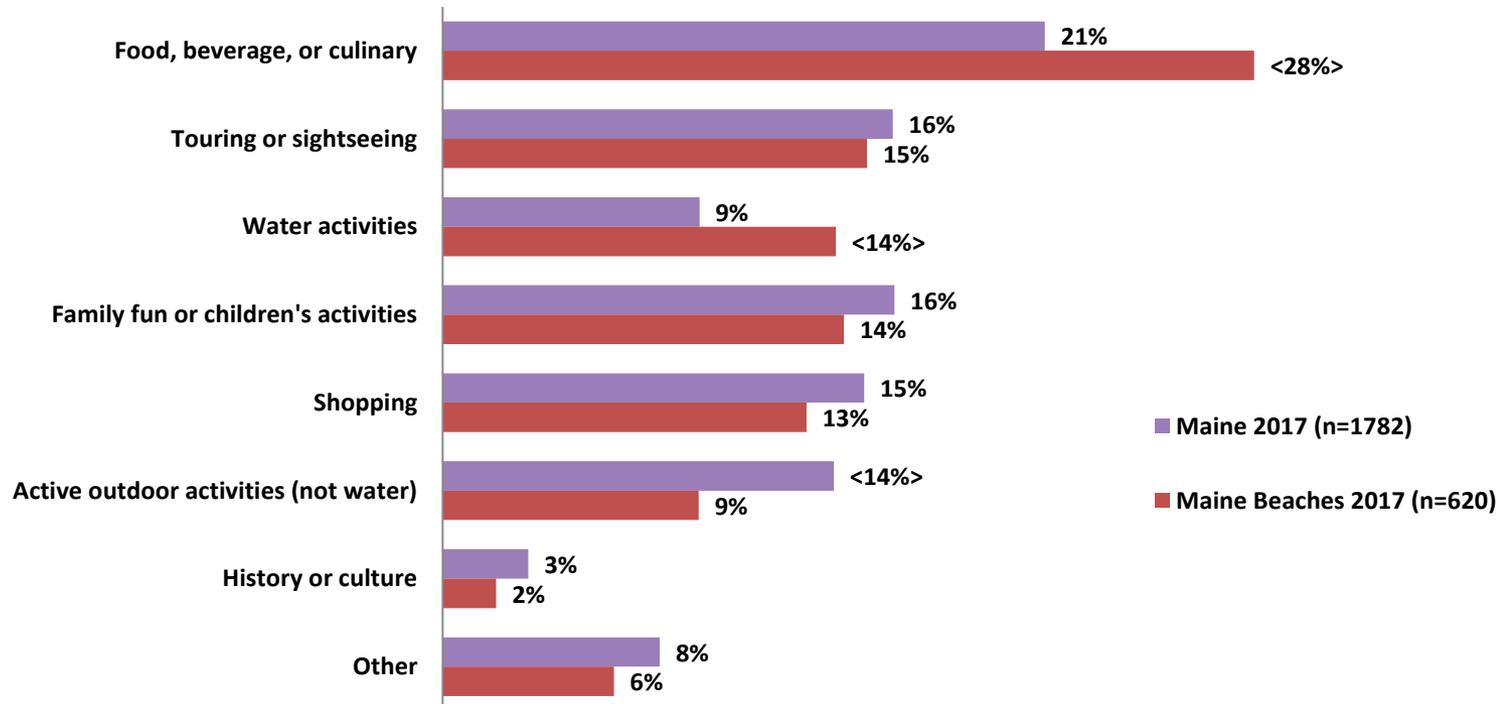
<> indicates a significant difference between this region and the State at the 95% confidence level.

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

When considering both interest and importance in deciding to visit, *food/beverage/culinary activities* rank highest among day visitors.

- Food/beverage/culinary activities and water activities are more important among day visitors to the Maine Beaches region than among day visitors to the State overall. Active outdoor activities are less important among day visitors to this region.

**2017 Interest Areas
Travel Driver Index**



Travel Driver Index = percentage selecting category as interest area X percentage ranking same interest area as most important

Q17. Which of the following *interest areas* did you want to pursue during this trip to Maine? Please check all that apply.

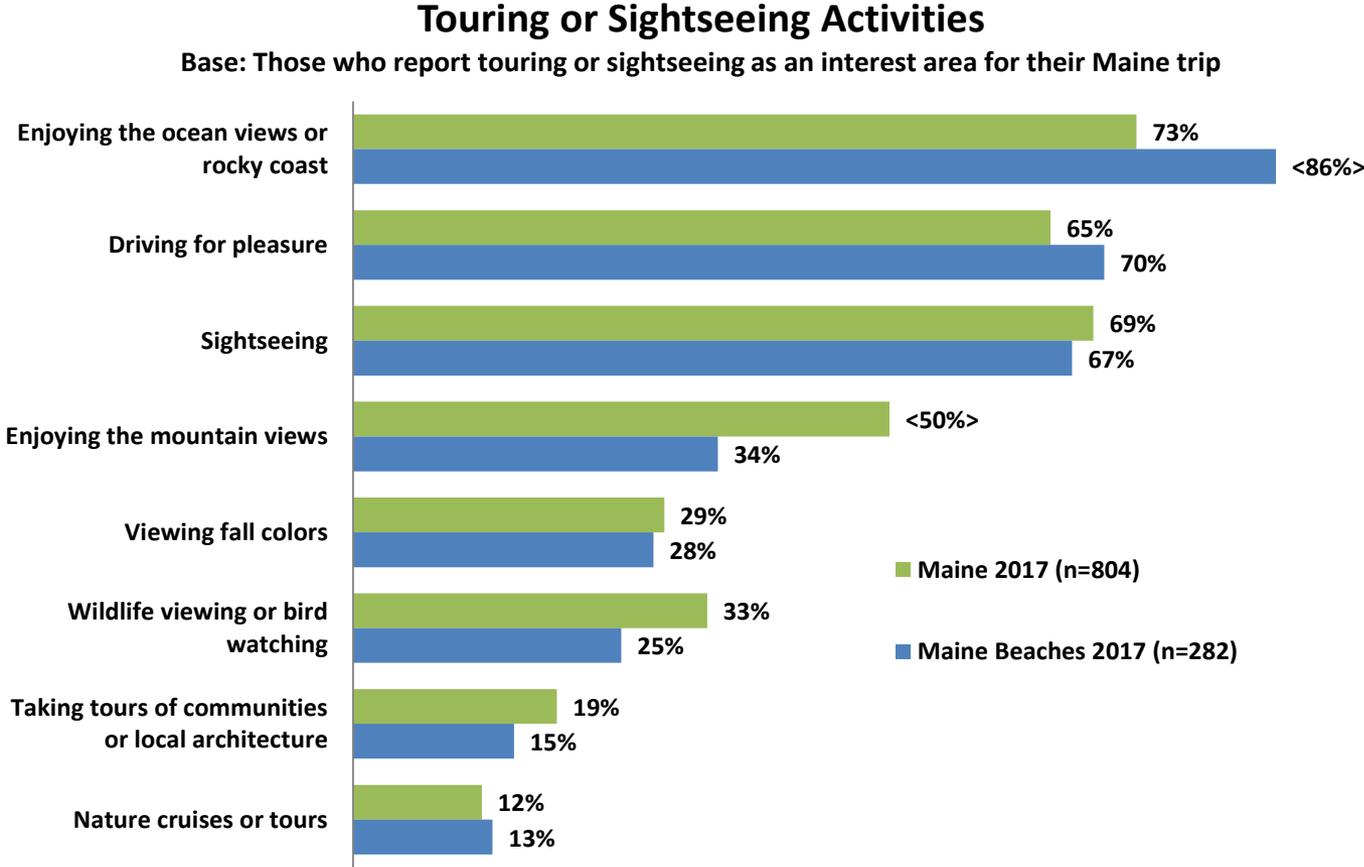
Q18. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important. 35

<> indicates a significant difference between this region and the State at the 95% confidence level.

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Enjoying the ocean views/rocky coast is the most popular activity among day visitors to the Maine Beaches who are interested in touring/sightseeing activities.

- A greater proportion of day visitors to this region *enjoy ocean views or the rocky coast* compared to all Maine visitors, while a lesser proportion *enjoy the mountain views*.



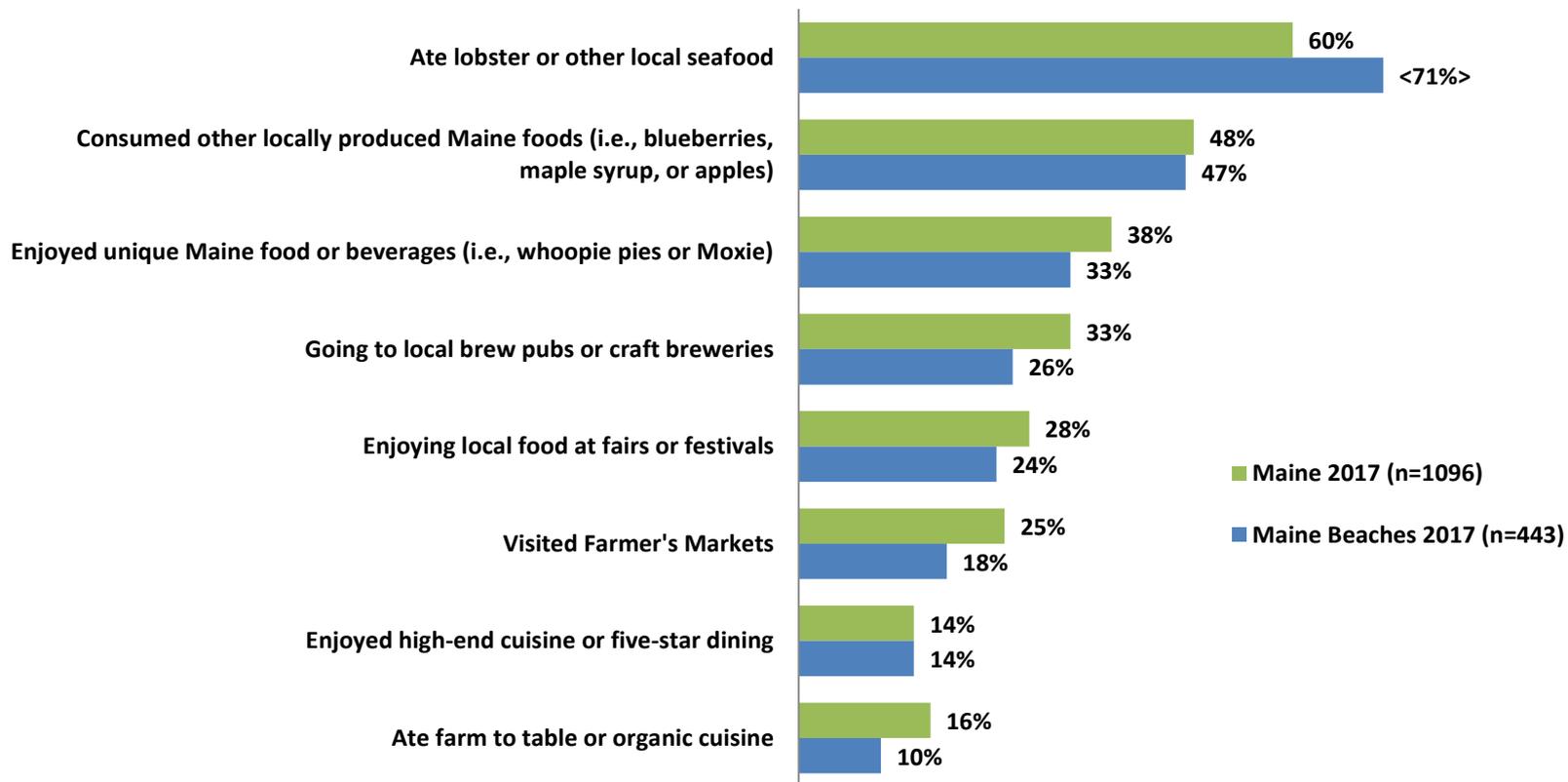
Q20. In which of the following activities did you participate during this trip? *Please check all that apply.*
 <> indicates a significant difference between this region and the State at the 95% confidence level.
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Seven in ten day visitors interested in food/beverage/culinary activities *ate lobster or other local seafood* while visiting the region.

- A greater proportion of day visitors to this region *ate lobster/other local seafood* compared to all Maine day visitors.

Food, Beverage, or Culinary Activities

Base: Those who report food, beverage, or culinary activities as an interest area for their Maine trip



Q20. In which of the following activities did you participate during this trip? *Please check all that apply.*

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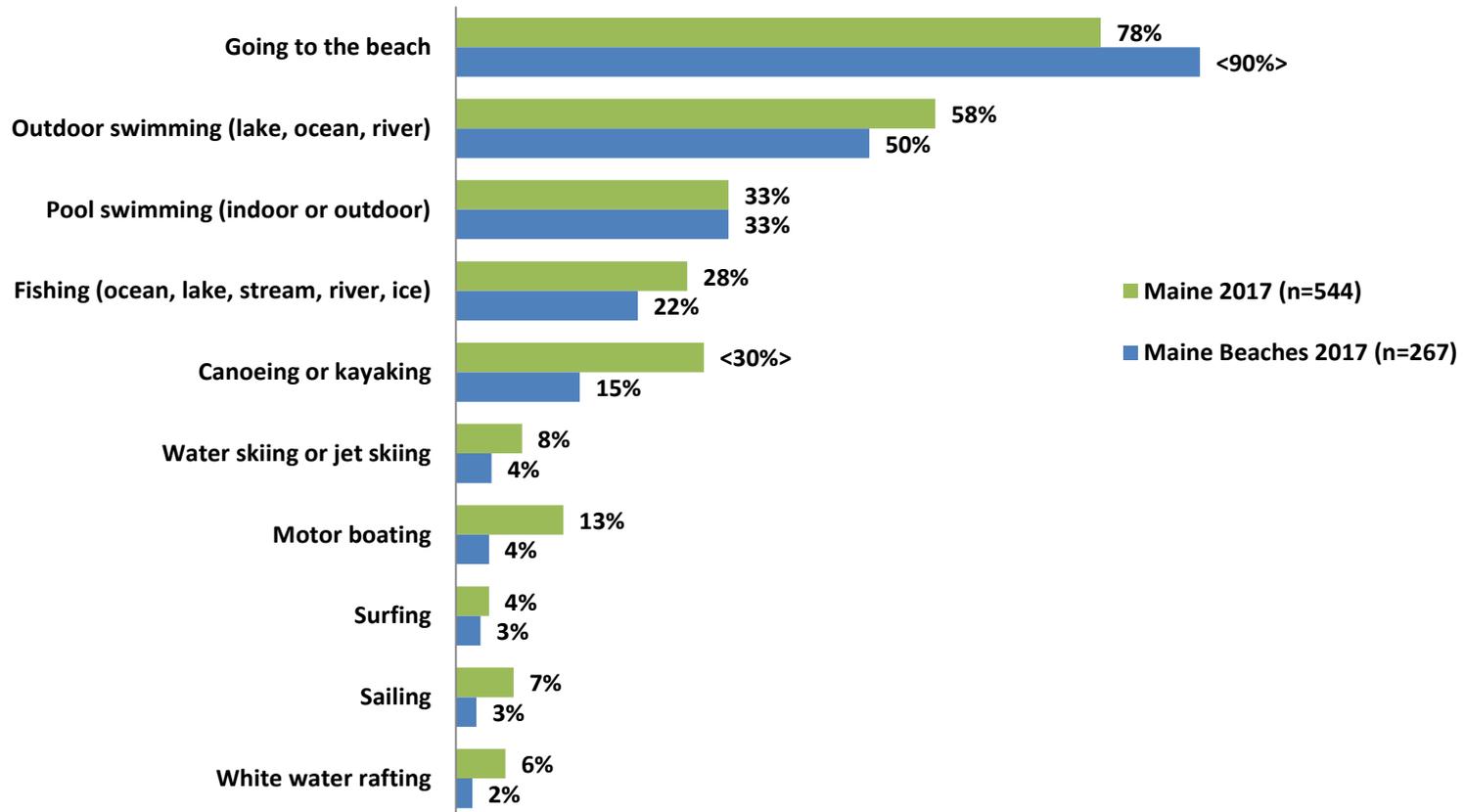
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Nine in ten day visitors to the Maine Beaches region who are interested in water activities spent time *at the beach* while visiting.

- As expected, day visitors to the Maine Beaches region are more likely than day visitors to the State overall to spend time *at the beach*. Day visitors to this region are less likely to do some *canoeing or kayaking* while in the area.

Water Activities

Base: Those who report water activities as an interest area for their Maine trip



Q20. In which of the following activities did you participate during this trip? *Please check all that apply.*

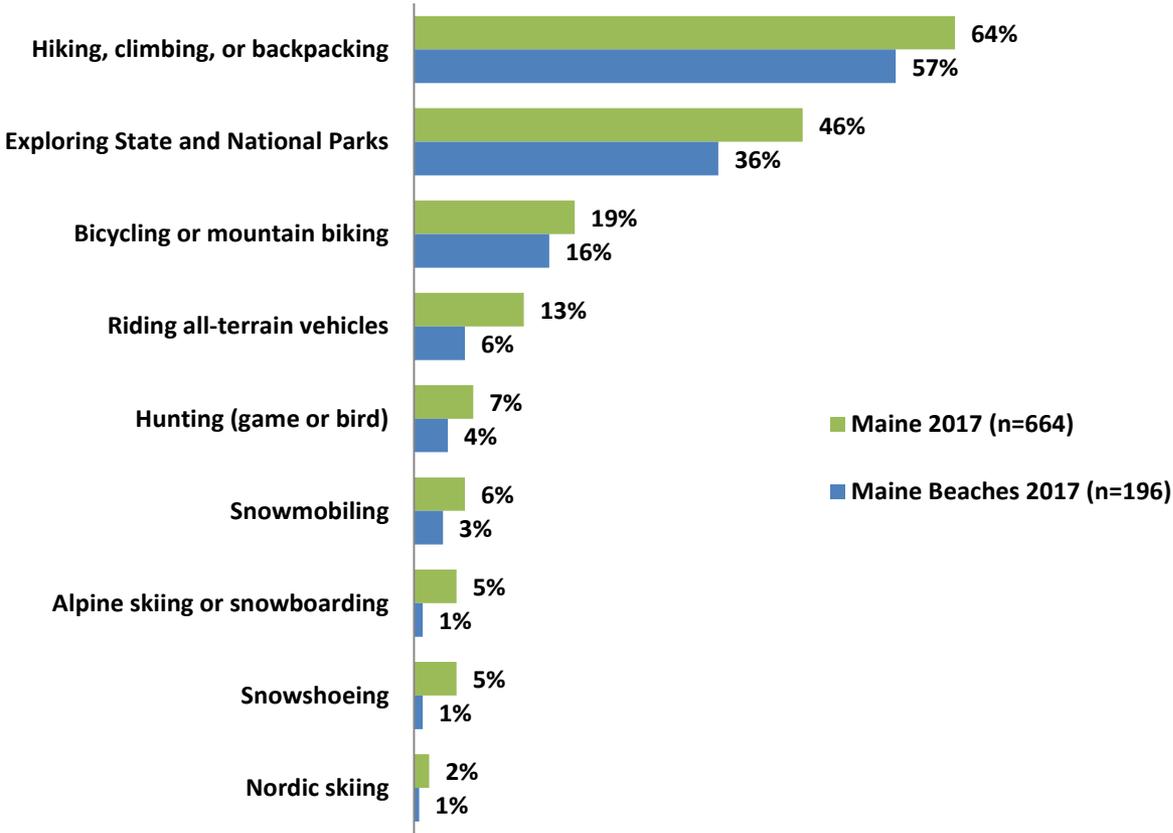
<> indicates a significant difference between this region and the State at the 95% confidence level.

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Hiking/climbing/backpacking is the most common activity among day visitors interested in active, non-water outdoor activities.

Active Outdoor Activities – Non-Water

Base: Those who report outdoor non-water activities as an interest area for their Maine trip



Q20. In which of the following activities did you participate during this trip? Please check all that apply.

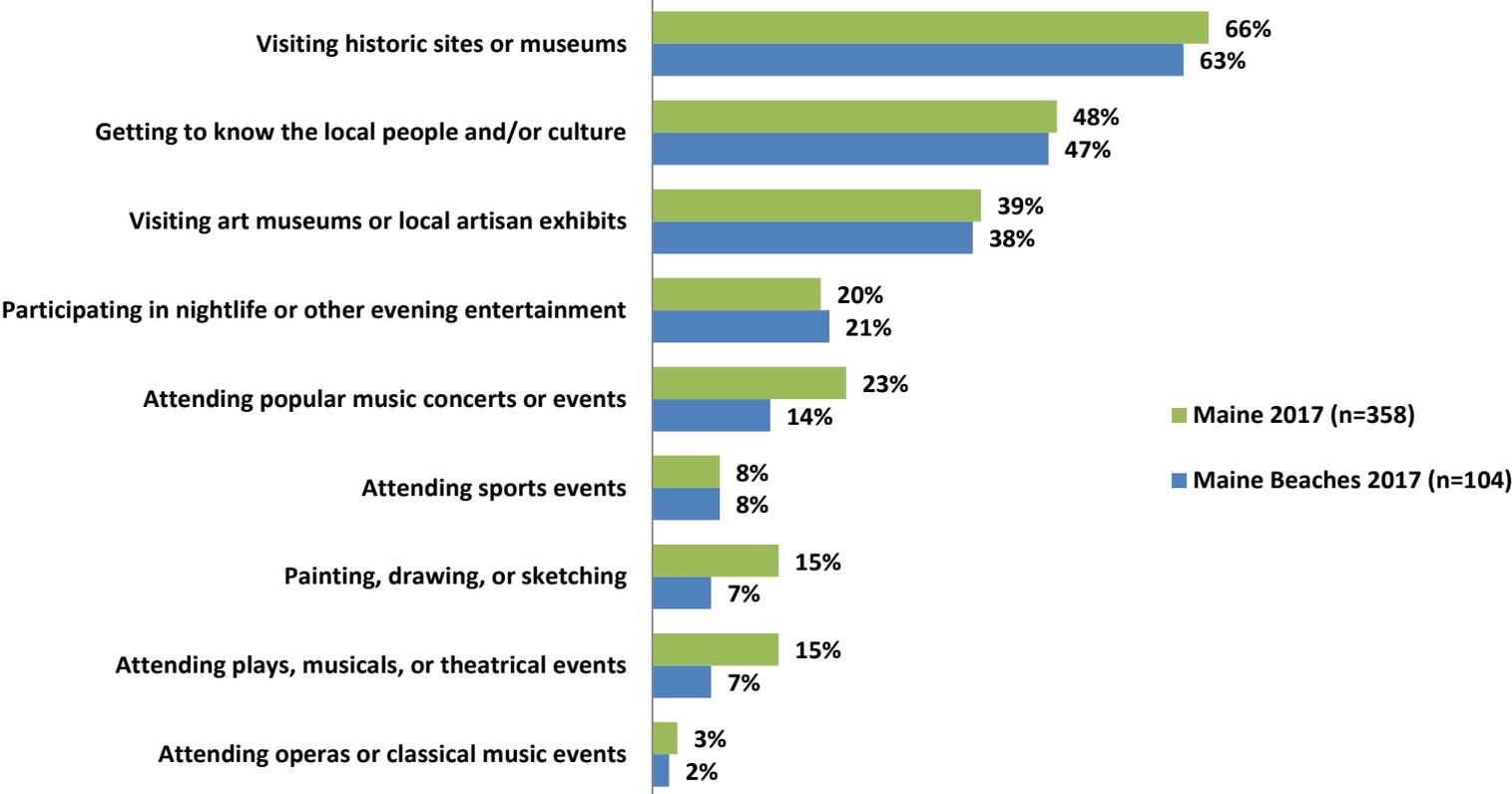
<> indicates a significant difference between this region and the State at the 95% confidence level.

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Two-thirds of day visitors to this region who are interested in history or culture visit *historic sites/museums* while in the area.

History or Culture Activities

Base: Those who report history or culture as an interest area for their Maine trip



Q20. In which of the following activities did you participate during this trip? Please check all that apply.

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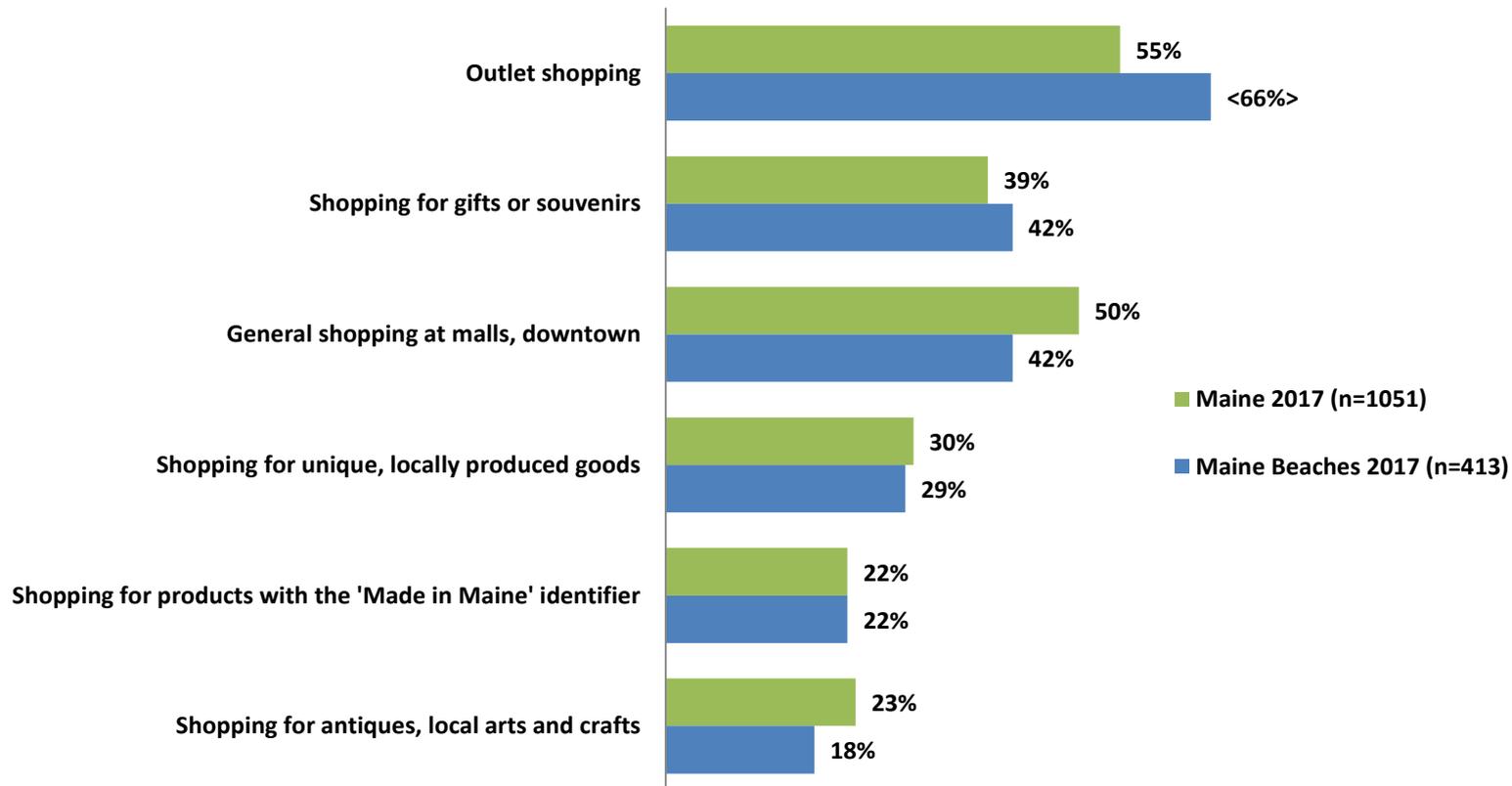
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Two-thirds of day visitors who are interested in shopping did some outlet shopping during their trip to the Maine Beaches region.

- Maine Beaches day visitors are more likely to *shop at the outlets* compared to visitors to the State of Maine overall.

Shopping Activities

Base: Those who report shopping as an interest area for their Maine trip



Q20. In which of the following activities did you participate during this trip? Please check all that apply.

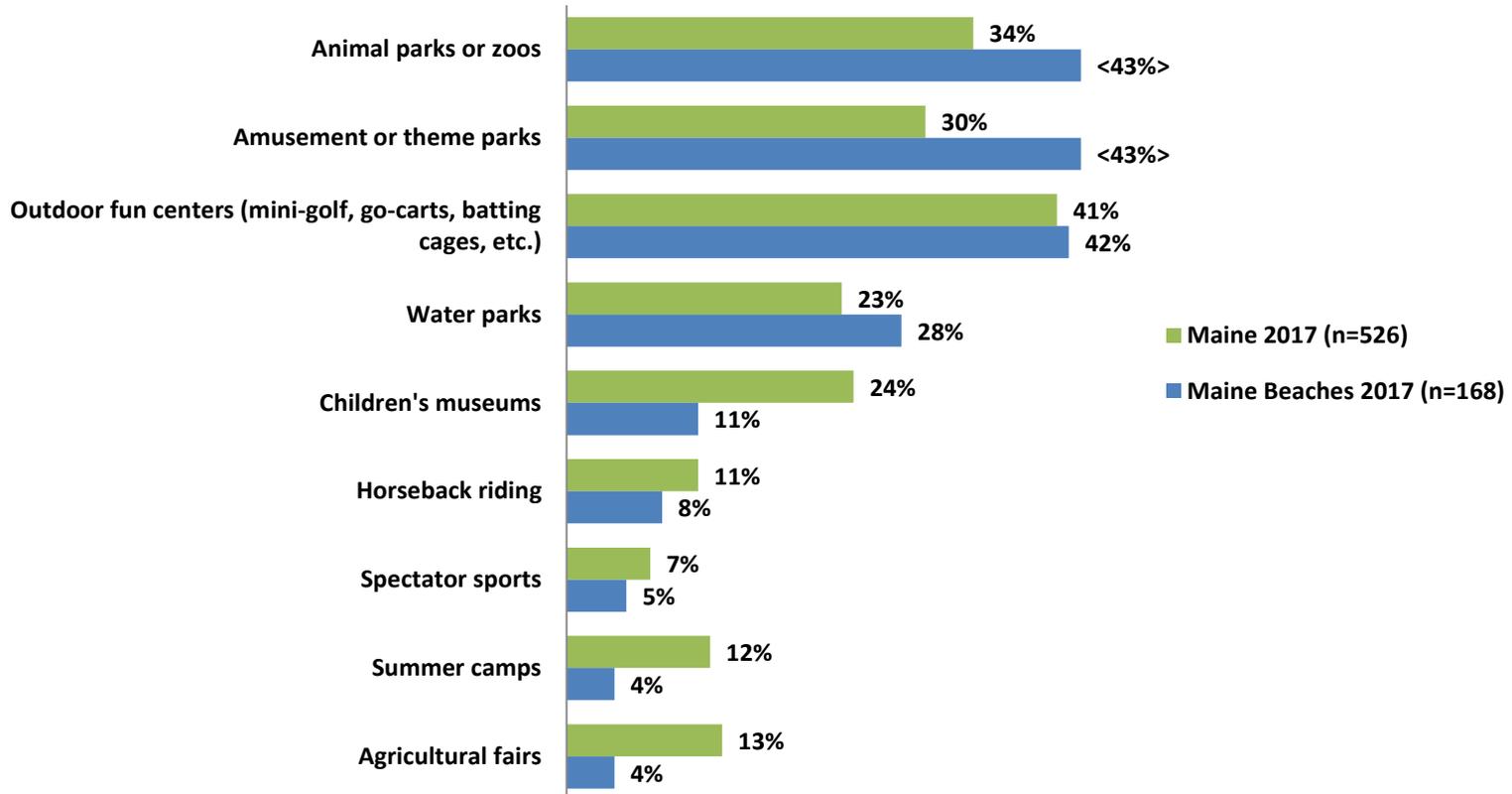
<> indicates a significant difference between this region and the State at the 95% confidence level.

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Animal parks/zoos, amusement parks, and outdoor fun centers are the most common family fun/children’s activities among day visitors to the Maine Beaches.

Family Fun/Children’s Activities

Base: Those who report family fun/children’s activities as an interest area for their Maine trip



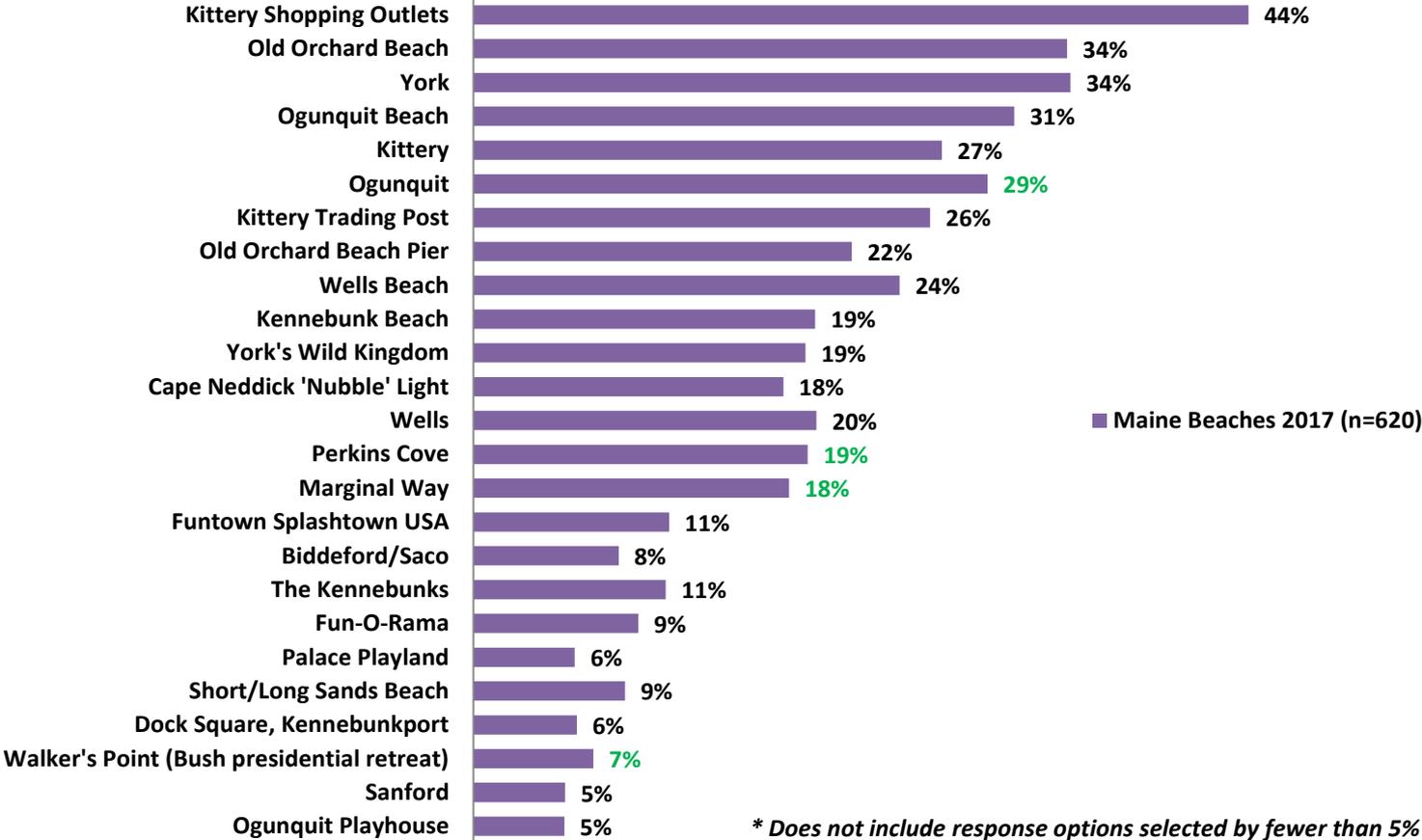
Q20. In which of the following activities did you participate during this trip? Please check all that apply.

<> indicates a significant difference between this region and the State at the 95% confidence level.

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Two in five day visitors to the Maine Beaches region visit the *Kittery Shopping Outlets* while visiting the region.

Top Attractions/Locations Visited*



* Does not include response options selected by fewer than 5% of respondents.

Comparison of Maine Beaches Visitors to Maine Visitors

Comparisons: Region vs. State

- Visitors to the Maine Beaches tourism region and visitors to the State of Maine as a whole differ in a number of areas. These variations can be seen in:
 - Visitor demographics,
 - Visitor origin,
 - Areas of interest, and
 - The activities they participate in while visiting.
- Visitor origin can clearly be attributed to the location of the Maine Beaches region, in close proximity to Massachusetts. Popular trip activities closely follow the many shopping and beach activities available in the Maine Beaches region.
- Highlights of these differences are shown on the following pages.

Visitor Origin

Compared to visitors to the entire State, Maine Beaches visitors differ in the following ways:

OVERNIGHT AND DAY VISITORS



A **greater** proportion of visitors from **New England**
(specifically, **MA** and **NH**)

Visitor Demographics

OVERNIGHT VISITORS



Tend to be **older**
More likely to be **repeat**
visitors

DAY VISITORS



Tend to be **older**
Higher annual household
incomes

Trip Interest Areas



Trip Interests and Importance (Travel Driver Index)



Trip Interests and Importance (Travel Driver Index)

OVERNIGHT VISITORS

More likely to place importance on **family fun/children's** activities

Less likely to place importance on **history/culture** activities

Trip Activities

OVERNIGHT AND DAY VISITORS

More likely to be:

Enjoying the **ocean views**

Eating lobster or other local seafood

Going to the **beach**

Outlet shopping

Visiting **amusement/theme parks**

Less likely to be:

Canoeing/kayaking

Enjoying the **mountain views**

Trip Activities

OVERNIGHT VISITORS

More likely to be:
Pool swimming
Visiting water parks

Less likely to be:
Fishing
Waterskiing/jet skiing
White water rafting
Camping
Attending agricultural fairs
Wildlife viewing/bird watching
Viewing fall colors

Trip Activities

DAY VISITORS

More likely to be:
Visiting **animal parks/zoo**s

Less likely to be:
Enjoying the **mountain views**



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Davidson-Peterson Associates
172 Commercial Street
Portland, ME 04101
207.985.7660
www.digitalresearch.com